

MINES 1970[®]

UNCLAIMED BENEFITS PRESERVATION FUND

REQUEST FOR PROPOSAL / REQUEST FOR QUOTATION: PROVISION OF TRACING SERVICES

Mines 1970 Unclaimed Preservation Pension Fund

Mines 1970 Unclaimed Preservation Provident Fund

Date of Issue: 14th April 2026

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1. LETTER OF INVITATION

To the Service Provider:

The Board of Funds for the Mines 1970 Unclaimed Preservation Pension Fund and the Mines 1970 Unclaimed Preservation Provident Fund ("the Funds") invites proposals from capable service providers for Tracing Services.

This document contains the services required to allow you to provide an accurate fee estimate for required services.

Please submit your bids for consideration by no later than 30th April, at 17h00 pm to Dudu@mines1970fund.org.za and Dirk@dte-consulting.co.za

Thanking you in advance for your time to respond to this Request for Quote.

Yours sincerely



Ms. Dudu Buthelezi
Principal Officer
Mines 1970 Preservation Pension and Provident Fund

Confidentiality of Information

Please note that all information, however communicated or recorded, regardless of the form it takes, provided by the Funds to your organization in connection with this cost proposal shall be for your exclusive use and may not be divulged.

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2. SCOPE OF SERVICE

The scope of work defines the deliverables to be provided by the successful Bidder. The Tracing agent will be required to provide the following services.

#	Description	Compliance	Non-Compliance
1.	Conducting interviews with beneficiaries: <ul style="list-style-type: none">▪ Telephonic▪ Face to Face		
2.	Collection and collation of documents: <ul style="list-style-type: none">▪ Personal identity documents and birth certificates.▪ Police report, if cause of death is unnatural.▪ Marriage certificates (Civil or customary, Lobola letter/certificate.▪ Death certificates.▪ Record of Service▪ Mining Industry Number.▪ Tax reference numbers.▪ Proof of tuition or schooling.▪ Proof of Income.▪ Any other proof of financial dependency.		
3.	Drafting of Resolution: <ul style="list-style-type: none">▪ Drafting of report/resolution including summary of interview, details about dependants and beneficiaries, financial affairs and proposed allocation.		
4.	Tracing: <ul style="list-style-type: none">▪ Tracing of potential beneficiaries.▪ Different stages/levels of tracing. Please confirm if additional costs will apply.		
5.	Tracing outside of South Africa: <ul style="list-style-type: none">▪ SADC▪ International		
6.	Languages: List languages you will be able to conduct interviews and investigations.		
7.	Attendance of meetings: Do you attend meetings to present the resolution and report of the investigations.		
8.	Is there a cost of attendance of meetings.		

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3. MANDATORY REQUIREMENTS

#	Description	Compliance	Non-Compliance
1.	B-BBEE Level: <ul style="list-style-type: none">What is your current B-BBEE status, and when was your last certificate issued?		
2.	Data Security: <ul style="list-style-type: none">Please provide us with confirmation of your breach procedure.What measures and processes you have in place to safeguard special, personal, and confidential information.Please provide us with confirmation of Protection of Personal Information Act compliance.Provide us with a statement of all litigation that has taken place involving your firm or its associates in the last five years as well as the outcome		
3.	Travelling and accommodation. Please confirm if there are travelling costs applicable for the following distances. <ul style="list-style-type: none">Within 0-50km radius151-200km radius201-250km radiusAbove 251km radius		
4.	The bidder must submit a comprehensive list of their current and past clients over the last ten years.		
5.	Provide proof of professional Indemnity cover as per: 5.1 Professional Indemnity insurance 5.2 Directors and Officers liability cover. 5.3 Cyber security insurance cover		

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4. Corporate Structure, Ownership & Transparency

The bidder is required to provide full disclosure of its legal and ownership structure to enable the Funds to conduct appropriate due diligence.

The following information must be provided:

4.1 Legal Entity Details

Provide the full registered legal name of the entity submitting the proposal.

4.2 Ownership and Shareholding Structure

Provide full details of all shareholders, including:

Full names of all individual shareholders

Percentage shareholding held

Where a shareholder is a juristic entity, full disclosure of the underlying natural persons (ultimate beneficial owners) must be provided

4.3 Beneficial Ownership

Disclose all direct and indirect beneficiaries and ultimate beneficial owners of the entity.

4.4 Subcontracting Arrangements

Indicate whether any part of the services will be subcontracted. If so, provide:

Full legal name of the subcontracted entity

Description of services to be subcontracted

Full ownership structure of the subcontractor (as per 4.2 above)

4.5 Associated and Related Entities

Provide a list of all associated, related, or group companies, including:

Subsidiaries

Holding companies

Entities under common control

4.6 Declaration

The bidder confirms that all information provided is complete and accurate and acknowledges that failure to disclose material information may result in disqualification.

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5. EVALUATION CRITERIA

The Board of Funds reserves the right to:

- Amend any bid conditions, bid validity period. RFP specifications, or extend the bid closing date, all before the bid closing date.
- Award this bid as a whole or in part or not make an award at all.
- Award this bid to more than one bidder.
- Negotiate with all or some of the shortlisted bidders.
- Request any relevant information and/or documents to verify or clarify information supplied in the bid response in relation, but not limited, to the structure of the bidding entity, bidder's B-BBEE profile, Specific Goals, proposed solution, proposed timelines etc.
- Not release information of another bidder that may be considered proprietary, sensitive or confidential.

By submitting a bid, the bidder hereby gives consent to Mines 1970 Funds to conduct any form of vetting or due diligence in relation to this tender on the bidding entity and/or any of its directors / trustees / shareholders / members.

Criteria	Points
Credentials of entity including B-BBEE Status	20%
Insurance & Fidelity Cover	15%
Pricing and value	25%
Experience and Track record	25%
Cyber Security and Technology	15%
Optimum blend of service providers in line with the Fund's needs	
Total	100%

6. PROPOSAL COSTS

- All costs and expenses incurred by the bidder relating to their participation in, and preparation of this proposal process shall be borne by the bidder exclusively.

7. IMPORTANT DATES

Activity	Date
Release of RFP	14 th April 2026
Last day of enquiries	24 th April 2026
Responses to enquiries	27 th April 2026
Closing date and time for submission of proposals	30 th April 2026
Submission Method: E-mail to the office of the Principal Officer	dirk@dtc-consulting.co.za dudu@mines1970fund.org.za
Send invitations to present to short listed candidates.	15 th May 2026
Receive presentations excl pricing, distribute to BoT	22 nd May 2026
Shortlisted candidates presenting to the Board	25 th May 2026
Final decision on preferred provider	5 th June 2026
Notify successful bidders	9 th June 2026
Finalise and sign agreement with selected providers	TBC