

## EXPRESSION OF INTEREST (EOI) TO APPOINT A SERVICE PROVIDER TO PARTNER WITH INSETA IN PROMOTING RESEARCH IN THE FIELD OF INSURANCE

**INSETA hereby notifies all PUBLIC INSTITUTIONS IN THE GAUTENG PROVINCE that have an existing MoU or is a Strategic Partner to INSETA to submit quotations for the services in promoting research in the field of insurance and contribute to the INSETA Research Agenda.**

The window to submit Eols will be open from **1<sup>st</sup> March 2023** and will close on **17<sup>th</sup> March 2023**. **NO late submissions will be considered after 17<sup>th</sup> March 2023 at 16H00.**

### **Please Note:**

1. Applicants that have signed an MoU with INSETA may apply.
2. Applicants that participate in INSETA strategic projects may apply.
3. No other applications for advertised Research Services will be considered for funding outside this process.

Complete the attached Eol form and submit to INSETA

(only an authorised person must sign off before the form is submitted)

Enquiries and/or submission of required documents must be directed to INSETA to Mr E Kaplan at [ernestk@inseta.org.za](mailto:ernestk@inseta.org.za) or Mr Z Desai at [zakariyyad@inseta.org.za](mailto:zakariyyad@inseta.org.za)

### SUMMARY OF APPLICATION

DETAILS	ESTABLISHMENT OF A RESEARCH PARTNERSHIP WITH INSETA
<p><b>Definition</b></p>	<p>INSETA is seeking to appoint a Public University as a Research Partner in Insurance in the Gauteng Province to support INSETA in the fulfilment of its research mandate and agenda.</p> <p>The research agenda is a framework for ensuring that the INSETA conducts relevant research to guide the sector on skills planning. It aims to ensure that the board, structures, forums, and management make decisions on investments in skills planning on the weight of empirical evidence.</p> <p>The INSETA uses its research agenda to identify the areas that should be researched and the type of research methodologies that should be employed. It provides clarity for making decisions about research activities. It also enforces knowledge-sharing through the establishment of collaborative engagement and partnerships.</p>
<p><b>Funding Window Opened</b></p>	<p><i>1<sup>st</sup> March 2023 and will close on 17<sup>th</sup> March 2023.</i></p>
<p><b>Contract Duration</b></p>	<p>The contract for the new service provider shall be committed over a period of four (4) years, subject to a renewal per year based on performance.</p>
<p><b>Eligibility Criteria for Service Provider</b></p>	<p>The bidder must meet the following for eligibility:</p> <ul style="list-style-type: none"> <li>a) A public university in Gauteng</li> <li>b) The nominated Research Manager/Programme Director must have a minimum of a Ph.D. qualification in the university (a concise CV must be provided, with a certified copy of the qualification).</li> <li>c) The nominated Research Administrator/s must have a minimum of a Postgrad qualification in the university (a concise CV must be provided, with certified copies of the qualification).</li> </ul>

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|  | <p>d) The Research Partner (The University) must have conducted or published research in one or more of the following areas: 4IR and technology; labour markets and the insurance sector; Insurance; Education and Skills development. (Supporting reference list of the research MUST be provided).</p> <p>e) Provide a detailed proposal replicating the scope of work, deliverables, work plans, estimated timeframes, budget, implementation structure, and concise CVs of the two or three personnel that are required to establish the Research Partnership.</p> <p>f) The Proposal must also address the following:</p> <ul style="list-style-type: none"> <li>▪ Area of expertise for which the institution will establish the Research Partnership and Centre of Excellence.</li> <li>▪ The location of the Research Partnership and Centre of Excellence in the university.</li> <li>▪ The proposed structure of the Research Partnership and Centre of Excellence.</li> <li>▪ Itemised annual budget with a cost breakdown and justification for amounts. The Research Team must have at least Two (2) or Three (3) members. (Research Manager &amp; Research Administrator x 2).</li> <li>▪ An allocated administrative budget percentage MUST be included in the cost breakdown. (N.B. Research Manager/Project administrator/s allowance allocation to be established per research project).</li> <li>▪ Letter of endorsement from the relevant Dean or Vice Chancellor of the University.</li> <li>▪ Understanding of the relevant skills development legislation.</li> <li>▪ Experience in undertaking large-scale research projects. (Previous Research Partnership experience with a SETA will be an added advantage).</li> <li>▪ Appropriately skilled team to carry out parallel activities including partnering/outsourcing and to undertake and ensure complete projects by the required dates.</li> <li>▪ Access to resources and infrastructure arrangements.</li> </ul> |
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	<p>Furthermore, The role of the Research Partner will be to convene Quarterly Research committee meetings with INSETA's already established committee members and discuss Key Themes and Areas of interest and urgency for Research. INSETA will have the final decision on the type of topics to be researched.</p>
<b>Contract Amount</b>	Per appointed quotation
<b>Contract Scope/Funding Covers</b>	<p>The INSETA will draw up a Service Level Agreement (SLA), with the service provider, and a proposed model/plan will be negotiated and approved on the project.</p> <p>The research focus areas will be aligned to the approved INSETA Research Agenda as well as Skills Planning and Skills forecasting for the Insurance sector based on the following themes:</p> <ul style="list-style-type: none"> <li>▪ Skills supply, demand, and mismatches</li> <li>▪ Sector profiling</li> <li>▪ Curriculum development</li> <li>▪ Occupations in high demand and skills gaps</li> <li>▪ Regulatory trends, risks, and taxation</li> <li>▪ Product development</li> <li>▪ New programme development</li> <li>▪ Research Capacitation</li> </ul>
<b>In Scope</b>	<p>The objectives of the Research Partner are to establish a Centre of Excellence and undertake applied sector skills planning research and contribute to meeting the targets set out on INSETA's research agenda in its sub-sectors, namely, long-term insurance; short-term insurance; life insurance; insurance &amp; pension funding; risk management; unit trusts;</p>

administration of health insurance; funeral insurance; reinsurance; pension funding; ancillary services and intermediary insurance.

Within these sub-sectors, INSETA is responsible for the:

1. Development of a Sector Skills Plan (SSP);
2. Development and administration of learnerships, internships, and bursaries;
3. Quality assurance of accredited training programmes;
4. Disbursement and analysis of skills levies;
5. Measuring skills demand, supply, and mismatches;
6. Developing scarce, pivotal, and critical skills lists; and
7. Promoting evidenced-based skills planning research.

The main goal of the Research Partnership (RP) is to strengthen and improve research and innovation capacity for the insurance sector. The role of the Research Partnership is to coordinate all the research programmes under the Centre of Excellence and provide advice and guidance.

The Research Partner will need to:

- Increase research outputs in the Insurance Sector;
- Respond to challenges facing the insurance sector through evidence-based research;
- Partnering with previously disadvantaged HEIs or TVET/CET colleges to assist in developing emerging researchers if required at the discretion of INSETA;
- To assist and participate in presenting research outputs in seminars/conferences on behalf of INSETA.



EMPOWERED TO **INFLUENCE** AND **INSPIRE!**

	<p>The Research Partnership portfolio must be designed to produce new insurance-specific research leadership capacity for INSETA.</p> <p>The benefits to INSETA include an open body of insurance knowledge, sector skills planning, and research support, information and knowledge sharing, new programme development, a partnership with a public university, and the infusion of emerging global knowledge to local practice, policy, and regulation.</p>
<b>Enquiries or Application submissions to:</b>	Mr E Kaplan at <a href="mailto:ernestk@inseta.org.za">ernestk@inseta.org.za</a> or Mr Z Desai at <a href="mailto:zakariyyad@inseta.org.za">zakariyyad@inseta.org.za</a>