

**REQUEST FOR QUOTATION (RFQ)**

**APPOINTMENT OF A SERVICE PROVIDER TO DRAFT, WRITE, EDIT, DESIGN,  
LAYOUT AND PRINT THE INSETA ANNUAL REPORT**

<b>RFQ</b>	<b>RFQ /2022/23/09</b>
<b>RFQ ISSUE DATE</b>	<b>20 March 2023</b>
<b>BRIEFING SESSION</b>	<b>N/A</b>
<b>RFQ DESCRIPTION</b>	<b>APPOINTMENT OF A SERVICE PROVIDER TO DRAFT, WRITE, EDIT, DESIGN, LAYOUT AND PRINT THE INSETA ANNUAL REPORT</b>
<b>CLOSING DATE &amp; TIME</b>	<b>24 MARCH 2023 @ 11:00</b>
<b>LOCATION FOR SUBMISSIONS</b>	<a href="mailto:rfqs@inseta.org.za">rfqs@inseta.org.za</a>

Bidders must submit responses via e-mail at: [rfqs@inseta.org.za](mailto:rfqs@inseta.org.za)  
For any queries or questions, please use above mentioned email address.

The INSETA requests your quotation on the services listed above. Please furnish us with all the information as requested and return your quotation on the date and time stipulated above. **Late and incomplete submissions will invalidate the quote submitted.**

SUPPLIER NAME: \_\_\_\_\_

POSTAL ADDRESS: \_\_\_\_\_

TELEPHONE NO: \_\_\_\_\_

FAX NO: \_\_\_\_\_

E MAIL ADDRESS: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

CELL NO: \_\_\_\_\_

SIGNATURE OF BIDDER: \_\_\_\_\_

**Board Members:** Mr. J.S. Ngubane (Chairperson), Ms. V. Pearson (Organised Employer), Ms. L. van der Merwe (Organised Employer), Ms. R.G. Govender (Organised Employer), Ms. P. Mendes (Organised Employer), Ms. Z. Motsa (Organised Employer), Mr. K.A.A. Sungay (Organised Employer), Mr. M. Soobramoney (Organised Labour), Mr. J.J.M. Mabena (Organised Labour), Ms. S.A. Anders (Organised Labour), Mr. C.B. Botha (Organised Labour), Ms. S.T. Dinyake (Organised Labour), Ms. N.B. Jonas (Organised Labour), Ms. F. Mabaso (Professional Bodies), Mr. S.M. Mpuru (Professional Bodies)

**CEO: Ms. G. Mkhize**

## 1. BACKGROUND

The Insurance Sector Education and Training Authority (INSETA) is a public entity listed in schedule 3A of the PFMA and was established in March 2000. The INSETA must, in accordance with any prescribed requirements to perform in accordance with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), any other relevant legislation and the Constitution.

INSETA is a Schedule 3A Public Entity in terms of the Public Finance Management Act No 1 of 1999, as amended (PFMA). This therefore implies that the INSETA must fully comply with all the requirements of the PFMA as well as the Irregular Expenditure Framework.

The objective of this request is to appoint a competent service provider to conceptualise, design, layout, print and deliver the INSETA **2022 - 2023** Annual Report. The Annual Report provides a comprehensive report on the activities and financial performance of the organisation throughout the preceding year according to the Skills Development mandate.

## 2. SCOPE OF WORK

### 2.1 Technical Outcome of the Annual Report

- 2.1.1 Quantity: 300
- 2.1.2 Size: A3 folded to A4
- 2.1.3 Orientation: Portrait
- 2.1.4 Pages Cover: 4 pages
- 2.1.5 Inner Pages: Approximately 120 pages (may vary by 10% - bidder to include variation in costing)
- 2.1.6 Colour: Full Colour Throughout
- 2.1.7 Paper Cover: 350gsm Matt Art
- 2.1.8 Finishing: Inner pages' machines throughout, cover matte with spot gloss
- 2.1.9 Cover: Matt with elements of UV Varnish combined with spot varnish - Foiling of the INSETA Logo and Name
- 2.1.10 Perfect Bound
- 2.1.11 Type setting: Annual Report Guide for Schedule 3A and 3C Public Entities
- 2.1.12 Bidder must make provision for photo stock for sector imagery- Maximum 10 stock photos

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## 2.2 Conceptualisation

- 2.2.1 Bidder is required to design the thematic 'look and feel' that best represents the INSETA for its financial and strategic performance – aligned to the INSETA Corporate identity manual (***this document will be circulated as an Annexure to the RFQ document***)
- 2.2.2 The bidder is required to provide a concept theme centred with a rationale for futuristic insurance related cover, insurance related images for the **2022/2023**
- 2.2.3 The Annual Report theme needs to reflect a strong futuristic insurance approach including imagery on the INSETA sectors.
- 2.2.4 The design concept fee should be inclusive of the final quoted project costing.

## 2.3 Design and Layout

Bidders design layout must be:

- 2.3.1 High Resolution scanning, photographic manipulation, etching and cropping where required
- 2.3.2 Creation and creative manipulation of graphs and tables, where applicable applying 3-D effects for a futuristic reporting aspect.

## 2.4 Content Management

- 2.4.1 Complete writing of the entire Annual Report - In addition the Bidder must conduct interviews with the Chairperson, CEO, Executive Management and Department heads to finalise their content for the Annual report.  
Strong technical writing skills for annual report is required.
- 2.4.1 Bidder is required to include Professional Proof-Reading services before Draft Annual Report gets submitted to the (1) National Treasury and (2) Auditor General as well as Department of Higher Education, Science and Technology.
- 2.4.2 Before the final Draft Annual report gets final signoff, it is to be proof-read again before it goes to print and presented to (3) Parliament. - *In total provision of three (3) rounds of professional proof readings will be required.*
- 2.4.3 Supplier to show exceptional project management skills with quick turnaround times and be meticulous in managing content (version control), reporting progress timeously and required to attend status updates meetings as and when required.

## 2.5 Pre-Press Management

- 2.5.1 Bureau – ready file generation
- 2.5.2 Impositioning (where applicable)
- 2.5.3 Colour and layout proofing from AGFA (or similar) colour correct play outs

## 2.6 Printing (draft)

- 2.6.1 3 x Draft Annual Reports in Word Format to be printed and bound (**as it will be submitted to the Auditor General and DHET for viewing & approval, and to provide an authorised proof copy for the INSETA- as part of the proof reading exercise**)

## 2.7 Deliverable- print and distribution (final)

- 2.7.1 Computer to press lithographic printing
- 2.7.2 5X CDs with high-resolution PDF and Professional Windows Format (MS-word) of Annual Report
- 2.7.3 2X CDs with low resolution PDF and Professional Windows Format (MS-word) of Annual Report
- 2.7.4 A total of **300 copies** of the Annual Reports to be printed and distributed as follows:
- **INSETA Office in 18 Fricker Road Illovo, Sandton:** 190 copies
  - **Parliament of the Republic of South Africa:** 65 copies + 1 usb with high-resolution PDF and Professional Windows Format (MS-word) of Annual Report
  - **Department of Higher Education, Science and Technology:** 31 copies + high-resolution PDF and Professional Windows Format (MS-word) of Annual Report
  - **Auditor General, Pretoria:** 10 copies
  - **National Treasury – Pretoria:** 2 copies
  - **National Treasury – Madiba Building, Pretoria:** 2 copies
- 2.7.5 An online version of the Annual Report as an e-book for uploading on the INSETA SETA website.
- 2.7.6 Bidder to make provision for courier costs all above mentioned sites.
- 2.7.7 **2022/2023 PowerPoint Presentation**
- The service provider will also be required to design and conceptualise a creative PowerPoint presentation that translates key elements of the **2022/2023** Annual Report. Maximum 50 slides
- 2.7.8 Copy: Text to be supplied electronically by the **INSETA**.

## 3. PHOTOGRAPHY

- 3.1 The service provider must provide the services of a professional photographer to take photographs of the Board Members and Staff Members

3.2 The photographer must budget for two days for photography. A disc of the photographs must be provided to INSETA.

### 3.3 MAKE-UP ARTIST SERVICES

3.3.1 Make-Up Artist services to the Board, Executives and Management during the photoshoot.

## 4. COSTING

4.1. The quotation must reflect a detailed cost breakdown indicating the following:  
**See table below as reference: (Pricing must include a detailed cost breakdown but not limited to)**

Line items to be delivered	Qty	Unit Price	Price
Technical Outcome of the Annual Report (Copies, in-line with the RFQ specification)			
DTP and layout - Additional Services - or photo stock, Conceptualization, image sourcing, Design and Layout			
Disc preparation including production and e-book (digital copies)			
PowerPoint Presentation slides including artwork in full colour			
Infographics (in-line with the RFQ specification)			
Content Management – copy writing, editing and proof reading			
Photography Services – Two days			
Makeup artist ( rate per hour)			
Delivery and Courier costs <b>(for the project as well as the distribution of samples)</b> - print and distribution (in-line with RFQ specification)			
Project Management fee/ Miscellaneous			
<b>Sub total</b>			
<b>VAT</b>			
<b>Total Price</b>			

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## 5. CONTRACT DURATION

The project duration is for a period of Once Off.

## 6. EVALUATIONS

### PREQUALIFICATION CRITERIA (Phase 1)

- 6.1. Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 6.2. Bidder must submit fully completed and signed bid documents:
- 6.3. **Standard Bidding Document (SBD 4) Bidder's Disclosure.**
- 6.4. **SBD 6.1 Preference Points Claim form.**
- 6.5. Signed **Request for Quotation (RFQ)** form.
- 6.6. **General Conditions of Contract (GCC)** initialled on each page.

## 7. MANDATORY CRITERIA (Phase 2)

- 7.1 Bidder to provide a minimum of 3 relevant references letters . The reference letters must not be older than five years.
- 7.2 Company profile

**Note: All bidders who do not comply with the items listed above will be disqualified for further evaluation.**

**Bidders who complied with phase 2 will be required to provide samples within 72 hours before price evaluation stage**

## 8. PRICE CONSIDERATION (Phase 3)

- 8.1 Service providers must ensure that the price quotations are inclusive of all applicable taxes (including VAT). Costing must comprise to all the relevant service proposed in the bidder submission.
- 8.2 Quotation on company letterhead aligned the items listed below:

## 9. CONTRACTUAL OBLIGATION

**The bidder will be required to comply with the following:**

- 9.1 The contract will be capped **R1 000 000,00 including VAT** for services required on an as when required basis.
- 9.2 Signatory to SBD 7.2 contract form with the bidders approved submission as annexure to the contract.
- 9.3 Successful bidders on the panel will be required to submit a price quotation each time a service is required.
- 9.4 For each service required the bidder will be required to accept a purchase order.

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- 9.5 Compliance with the general conditions of contract.
- 9.6 In the case of the service provider using sub-contractors, the former will be responsible for ensuring delivery of services from any such sub-contractors and for making any payments to such sub-contractors.
- 9.7 The successful bidder will be required to have adequate professional indemnity as well liability insurance in place (**upon parties contracting**).
- 9.8 **Bidder must adhere to Protection of Personal Information (POPI) Act.**

## 10. ADJUDICATION USING A POINT SYSTEM

- 10.1 The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.
- 10.2 Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.
- 10.3 In the event that two or more bids have scored equal points in terms of price and preference points for BBEE, the successful bid must be the one scoring the highest number of preference points for BBEE - in terms of PPPFA Act 5 of 2000.
- 10.4 However, when functionality is part of the evaluation process and two or more bids have scored equal points for BBEE, the successful bid must be the one scoring the highest score for functionality.
- 10.5 Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

## 11. POINTS AWARDED FOR PRICE AND BBEE PREFERENCE POINT

- (1) The following formula will be used to calculate the points out of 80 for price in respect of an invitation for a tender with a Rand value equal to or below R50 million, inclusive of all applicable taxes:

$$P_s = 80 \{1 - (P_t - P_{min})\}$$

P min

Where:

P <sub>s</sub>	=	Points scored for comparative price of bid under Consideration
P <sub>t</sub>	=	Comparative price of bid under consideration
P <sub>min</sub>	=	Comparative price of lowest acceptable bid

- (2) A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender.
- (3) The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.
- (4) Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

## 12. SPECIFIC GOALS POINTS WILL BE AWARDED AS FOLLOWS:

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Table 1: Specific goals for this bid and points claimed are indicated per the table below.

Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such. The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprise with ownership 100% black owned-: Ownership	10	20		
Enterprise with ownership 80% and above black owned-: Ownership	10	20		
Enterprise with ownership 51% to 79% black owned-: Ownership	9	18		
Enterprise with ownership 51% women - : Ownership	9	18		
Enterprise with ownership 50% black owned-: Ownership	4	12		

**Note: Evidence to be submitted by Emerging Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) – sworn affidavit (DTI or CIPC Template, Generic entities – SANAS accreditation.**

- Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.
- Bidders who qualify as EME's and QSE's in terms of the B-BBEE Act must submit a Sworn affidavit. Misrepresentation of information constitutes a criminal offence.
- Bidders other than EME's or QSE's must submit their original and valid B-BBEE status level verification certificate and BBBEE Scorecard, substantiating their B-BBEE rating and black

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### 13. Consortium

- i. A consortium is an association of two or more individuals, companies, organisations or governments (or any combination of these entities) with the objective of participating in a common activity or pooling their resources for achieving a common goal.
- ii. A consortium requires that each participant retains its separate legal status and the consortium's control over each participant is generally limited to activities involving the joint endeavour, particularly the division of profits. A consortium is formed by contract, which designates the rights and obligations of each member.
- iii. In a consortium, only the lead bidder's credentials both in terms of financial and technical qualifications are considered. Therefore, the interpretation and application to a RFQ/Bid process is such that the lead partner is identified and the following requirements are required as follows:

#### a) Lead Partner

- All administrative documents (consortium agreement between the lead partner and the partner)
- Technical requirements (which will show in the proposal and other requirements why the need for the consortium, which for all intent and purpose fulfils the requirements of the bid through combination of skills)

#### b) Partner

- Proof of CSD registration.
- Tax Pin.
- BBBEE Sworn-Affidavit.
- SBD 4

- iv. It should be taken into cognisance that although the lead partner is the qualifying entity, the partner should prove that it can do business with state-owned entities, through CSD registration, proof that the taxes are compliant, its level of BBBEE status in order to align with the specific goals required by the BID, declare interest and answer questions that it is not a disqualified entity with the National Treasury. The foregoing ensures compliance from an SCM process perspective that the consortium is in order.
- v. Of importance is that in a consortium, each individual team members retain their identities.

#### b. A joint venture

- i. A joint venture is a business entity created by two or more parties, generally characterized by shared ownership, returns and risks and shared governance.

#### c. Unincorporated joint venture:

- i. All SCM documents are filled in by the joint venture in the name of the joint venture, although the submission of administrative documents (partnership agreement between



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parties) will be completed in the name of the joint venture, and the following will be required from both parties, amongst others

- a) SBD 4
- b) SBD 6
- c) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBBEE Certificate.

**d. Incorporated joint venture**

- i. This aligned to a registered entity or company. A registered entity/ company with a consolidated BBBEE certificate and a bank account in the name of the Joint venture.

The required compliance documents must be complete by the entity/ company the name of the joint venture, and the following will be required amongst others

- a) SBD 4
- b) SBD 6
- c) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint BBBEE Certificate.

**14. COMMUNICATION**

- 14.1 Respondents are warned that a response will be disqualified should any attempt be made by a bidder either directly or indirectly to canvass any officer(s) or employees of INSETA in respect of BID process, between the closing date and the date of the award of the business.

All enquiries relating to this BID should be emailed **three days before the closing date.**

## 15. CONDITIONS TO BE OBSERVED WHEN BIDDING

The organization does not bind itself to accept the lowest or any BID, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and delivery of his BID submission. The organization also reserves the right to withdraw or cancel the BID at any stage.

No BID shall be deemed to have been accepted unless and until a formal contract / letter of award is prepared and executed.

The competitive shall remain open for acceptance by the Organization for a period of **120 days** from the closing date of the BID Enquiry.

INSETA reserves the right to:

- a. Not evaluate and award a bid that do not comply strictly with this BID document.
- b. Make a selection solely on the information received in the Bid Document and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the terms of reference.
- c. Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders. During the evaluation process, no change in the content of the BID shall be sought, offered or permitted.
- d. Cancel this BID at any time as prescribed in the PPPFA.
- e. Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

## 16. COST OF BIDDING

- a. The bidder shall bear all costs and expenses associated with preparation and submission of its BID submission and the INSETA shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.

## 17. NOTE TO BIDDERS:

- a. Due diligence to be conducted by INSETA prior to the award of the contract – where applicable.

**END OF DOCUMENT**