

EXPRESSION OF INTEREST (EOI) TO APPOINT A SERVICE PROVIDER TO PARTNER WITH INSETA IN PROMOTING RESEARCH IN THE FIELD OF INSURANCE: SPECIALIZING IN THE FIELD OF EDUCATION AND TRAINING RESEARCH

INSETA hereby notifies all PUBLIC UNIVERSITIES IN SOUTH AFRICA 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 EOIs will be open from **21st June 2023** and will close on **7th July 2023**. **NO late submissions will be considered after 7th July 2023 at 17H00.**

Please Note:

1. All Public Universities in South Africa may apply.
2. All submissions that are found to have a misrepresentation of information will not be considered.
3. All EOIs should contain sufficient information to allow the INSETA to make a fair determination on awarding/not awarding funds.
4. Collaborations with Private Sector and Public Higher Education Institutions in submission of EOIs are encouraged due to INSETA's mandate to link the Private Sector with Public Higher Education Institutions.
5. **This EOI is subject to an optional briefing session scheduled to take place virtually on MS Teams on the 26th June 2023 at 11h00 – 12h00. Kindly contact the relevant personnel below to gain access to the meeting link.**

Complete the attached EOI 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 and Mr Z Desai at zakariyyad@inseta.org.za

SUMMARY OF APPLICATION

DETAILS	ESTABLISHMENT OF A RESEARCH PARTNERSHIP WITH INSETA
Definition	<p>The INSETA is seeking to appoint a Public University as a Research Partner in Insurance to support it in fulfilment of its research mandate and agenda, specializing in the field of education and training.</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 Research Agenda identifies the research needs of the SETA. The INSETA uses its research agenda to identify the areas that should be researched and the type of research methodologies that should be applied. It provides clarity and a framework for making decisions about research activities which feeds into the INSETA Strategic Plan (SP), Annual Performance Plan (APP) and Sector Skills Plan (SSP).</p>
Background	<p>The objectives of the Research Partner is to use their already established Centre of Excellence to undertake applied sector skills planning research and contribute to the INSETA's research agenda in its sub-sectors, namely, long- term insurance; short-term insurance; life insurance; insurance & pension funding; risk management; unit trusts; administration of health insurance; funeral insurance; reinsurance; pension funding; ancillary services and intermediary insurance.</p> <p>Within these sub-sectors, the INSETA is responsible for the:</p> <ol style="list-style-type: none"> 1) Development of a Sector Skills Plan (SSP); 2) Development and administration of learnerships, internships and bursaries;

	<p>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.</p> <p>In light of this, the main goal of the Research Partnership is to strengthen and improve the research and innovation capacity for the insurance sector and contribute towards the INSETA Research Agenda. The role of the Research Partnership is to coordinate all the research programmes under the Centre of Excellence and provide advice and guidance.</p> <p>The key objectives of the Research Partner are to:</p> <ul style="list-style-type: none"> • Increase research outputs in the Insurance Sector; • Respond to challenges facing the insurance sector through evidence-based research; • Partnering and collaborating with HEIs/TVETs/CET to assist in the sharing of knowledge and information, and bridge the skills gap between PSET institutions; • To assist and participate in presenting research outputs in seminars/conferences on behalf of the INSETA. <p>Furthermore, The role of the Research Partner will be to convene Quarterly Research committee meetings with the INSETA's already established Research & Learning committee members and discuss Key Themes and Areas of interest and urgency for Research. The INSETA will have the final decision on the type of topics to be researched.</p>
Funding Window Opened	<i>21st June 2023 and will close on 7th July 2023.</i>

Contract Duration	The contract for the new service provider shall be committed over a period of two (2) years, subject to a renewal per year based on performance and the availability of funds.
Eligibility Criteria for Service Provider	<p>The bidder must meet the following for eligibility:</p> <ul style="list-style-type: none"> a) A public university in South Africa. b) The nominated Partner Research Manager must have minimum of a PhD qualification in the university (a concise CV must be provided, with a certified copies of the qualification). c) The nominated Research Coordinator/s must have minimum of a Postgrad qualification in the university (a concise CV must be provided, with a certified copies of the qualification). d) The Research Partner (The University) must have conducted or published research in the area of Education and Skills Development, supporting reference list of the research must be provided. e) The Research Partner (The University) is expected to demonstrate a genuine commitment to collaborating with other PSET (Post-Secondary Education and Training) institutions, i.e. TVET/CET Colleges etc to share knowledge and information. This entails furnishing illustrative examples of the various agreements that can be established. f) Provide at least three detailed proposals from the topics mentioned in the <u>scope</u> below, consisting of the scope of work, deliverables, work plans, estimated timeframes, budget, implementation structure, and the potential researchers that will be contracted to complete the research projects. This is required for reviewing the research partner's capabilities on conducting research and managing research projects. g) The Bid Proposal must also address the following: <ul style="list-style-type: none"> • Area of expertise for which the institution will establish the Research Partnership and Centre of Excellence.

	<ul style="list-style-type: none"> • The faculty/location of the Research Partnership and Centre of Excellence in the university. • The proposed structure of the Research Partnership and Centre of Excellence. • At least three detailed proposals from the topics mentioned in the <u>scope</u> below, consisting of the scope of work, deliverables, work plans, estimated timeframes, budget, implementation structure, and the researchers who will be contracted to complete the research projects. • Letter of endorsement from the relevant Dean or Vice Chancellor. • Understanding of the relevant skills development legislation. • A table displaying experiences in undertaking large-scale research projects in the area of Education and Skills Development with the reference list. • Appropriately skilled team to carry out parallel activities including outsourcing to private/public sector and to undertake and ensure complete projects by the required dates. • Access to resources and infrastructure arrangements.
Contract Amount	Per appointed quotation. (Subject to negotiation)
Contract Scope/Funding Covers	<p>The INSETA will draw up a Service Level Agreement (SLA), with the service provider, and a proposed 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 the Skills Planning and Skills forecasting target obligations and will be based on the following key themes:</p> <ol style="list-style-type: none"> a) Promotion and development of Skills Research for the Insurance Sector b) Concrete actions to strengthen the M&E of INSETA

	<p>c) Follow-through on the implementation of interventions to support ERRP Skills Strategy</p> <p>d) Interventions in support of the Presidential Youth Employment Initiatives</p> <p>e) Interventions to address the identified Skills Change Drivers</p>
In Scope	<p>The Research Partner specializing in Education and Training research is expected to undertake various types of research projects, which include but are not limited to, the following, as expected by the INSETA.</p> <ul style="list-style-type: none"> • Analysis of educational policies and their impact on access, equity, and quality of the education-to-work transition that the INSETA may provide to its stakeholders. • Conducting impact assessments and tracer studies on INSETA programmes. • Evaluating the effectiveness of Work-Based Learning Programs in addressing occupational shortages and skills gaps. • Examining insurance sector occupational shortages which requires the upskilling and reskilling of individuals. • Collaborate and work with TVET colleges to share/transfer research, knowledge and information.
Enquiries or Application submissions to:	Mr E Kaplan at ernestk@inseta.org.za and Mr Z Desai at zakariyyad@inseta.org.za