

## RE-ADVERTISEMENT

### 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 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 9<sup>th</sup> August 2023 and will close on 28<sup>th</sup> August 2023. **NO late submissions will be considered after 28<sup>th</sup> August 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.

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](mailto:ernestk@inseta.org.za) and Mr Z Desai at [zakariyyad@inseta.org.za](mailto:zakariyyad@inseta.org.za)

## SUMMARY OF APPLICATION

DETAILS	ESTABLISHMENT OF A RESEARCH PARTNERSHIP WITH INSETA
<b>Definition</b>	<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.</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>
<b>Background</b>	<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 &amp; 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"> <li>1) Development of a Sector Skills Plan (SSP);</li> <li>2) Development and administration of learnerships, internships and bursaries;</li> <li>3) Quality assurance of accredited training programmes;</li> <li>4) Disbursement and analysis of skills levies;</li> <li>5) Measuring skills demand, supply and mismatches;</li> <li>6) Developing scarce, pivotal and critical skills lists; and</li> </ol>

	<p>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 providing advice and guidance.</p> <p>The key objectives of the Research Partner are to:</p> <ul style="list-style-type: none"> <li>• Increase research outputs in the Insurance Sector;</li> <li>• Respond to challenges facing the insurance sector through evidence-based research;</li> <li>• Partnering and collaborating with other PSET Institutions in the sharing of knowledge and information through research;</li> <li>• To assist and participate in presenting research outputs in seminars/conferences on behalf of the INSETA.</li> </ul> <p>Furthermore, The role of the Research Partner will be to convene Quarterly Research committee meetings with the INSETA's already established Research &amp; 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 which is aligned to its Agenda.</p>
<b>Funding Window Opened</b>	<i>9<sup>th</sup> August 2023 and will close on 28<sup>th</sup> August 2023.</i>
<b>Scope of Work and Deliverables</b>	The successful institution is expected to assist INSETA in undertaking evidence-based and innovative research outlined in its Research Agenda and Annual Performance Plan target commitments.
<b>Contract Duration</b>	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.

<b>Details of the Proposal</b>	Bidders should note that the INSETA requires full details of the proposed project, and all proposals must include the following:  <div><div>1. Institution Profile</div><div>2. Introduction</div><div>3. Problem Statement, Research Aim and Objectives</div><div>4. Preliminary Literature Review</div><div>5. Methodology including, but not limited to, empirical studies with data analysis, theoretical investigation, data-driven methodologies, case studies</div><div>6. Project Implementation Plan including research budget</div><div>7. Partnering and collaborating with other PSET Institutions</div></div> <i>Failure to comply with the above proposal structure will result in the rejection of your submission.</i>						
<b>Contract Amount</b>	Per appointed quotation. (Subject to negotiation)						
<b>Contract Scope/Funding Covers</b>	The INSETA will draw up a Service Level Agreement (SLA), with the service provider, and a project plan which consists of three research outputs per year will be negotiated and approved. Funding covers completed research outputs produced.						
<b>Proposal Evaluation Process</b>	<div>The evaluation process is to be undertaken in two stages as follow:</div> <table><tr><td><b>Stage 1: Mandatory Criteria</b></td><td>Institution’s submission format in compliance with the format outlined in:<ul style="list-style-type: none"><li>Details of the Proposal</li><li>Mandatory Evaluation Criteria</li></ul></td></tr><tr><td><b>Stage 2: Functionality Evaluation Criteria</b></td><td>Institutions’ content of the proposal assessed based on the functionality evaluation criteria</td></tr></table>			<b>Stage 1: Mandatory Criteria</b>	Institution’s submission format in compliance with the format outlined in: <ul style="list-style-type: none"><li>Details of the Proposal</li><li>Mandatory Evaluation Criteria</li></ul>	<b>Stage 2: Functionality Evaluation Criteria</b>	Institutions’ content of the proposal assessed based on the functionality evaluation criteria
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<b>Stage 2: Functionality Evaluation Criteria</b>	Institutions’ content of the proposal assessed based on the functionality evaluation criteria						

<p><b>Mandatory Evaluation Criteria</b></p>	<p>Interested parties are requested to note that this is a mandatory criteria and failure to comply with the requirements as set below will result in any party's submission being rejected.</p> <p>Institutions shall submit their responses in accordance with the response format specified below (each schedule must be clearly marked, indexed and /or clearly referenced):</p> <p>Schedule 1:</p> <ol style="list-style-type: none"> <li>1. <u>Cover Page</u>: The cover page must clearly indicate the name of the institution and legal registration information as a higher education institution. The cover letter should be brief (not more than two pages maximum).</li> <li>2. <u>Executive Summary</u>: Describe why your institution should be considered as the best qualified to achieve any/or of the services enlisted in this expression of interest. Brief institutional profile (not more than five pages maximum).</li> <li>3. <u>Experience</u>: Submit a detailed list of similar services/appointments completed within the past five years, supported by reference letters for each/respective service/appointment listed above.</li> <li>4. <u>Qualifications and Experience</u>: This subsection must contain relevant information on qualifications and experience of the project team as follows: <ul style="list-style-type: none"> <li>• Project implementation structure: The proposed composition and implementation of the team/personnel. This list should include the identification of the project partner who will have primary responsibility for the INSETA appointment, and project team/ other personnel to be allocated for this appointment.</li> <li>• Qualifications and Experience: This part must contain relevant information on the qualifications and experience related to the project team and proposed project partner.</li> </ul> </li> <li>5. <u>Signature Requirements</u>: All proposal must be accompanied by the Reply-Back Form issued with this EOI and signed on behalf of the institution by an authorised person only. The name and title of the individual(s) signing the bid must be clearly shown with the signature. A power of attorney is required If any other person signs the proposal and/supporting documents on behalf of the institution.</li> </ol>
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	<p>6. <u>Research Proposals</u>: The research proposal must cover the following aspects: (1) Expanding Labour Market Intelligence (LMI) and Post-School Education research and innovation in the insurance sector (2) Undertaking skills development research relating to the Insurance Sector with the intention of improving competitiveness in the sector (3) Developing a research agenda and conducting relevant research (4) Willingness to collaborate with PSET institutions.</p> <p>Schedule 2:</p> <p>The following supporting documents must be submitted in this schedule:</p> <ol style="list-style-type: none"><li>Valid tax clearance certificate or confirmation of pin.</li><li>Certified copies of the institution's registration with the DHET (if applicable)</li><li>Certified copies of the proposed research partner's professional accreditation (if applicable)</li></ol>				
Functional Evaluation Criteria		Criteria		Point Allocation	Weighting
	1	Background and Research Expertise			
	1.1	Does the proposal adequately cover the scope of work or relevant to the Insurance Sector?	The proposal adequately covers the scope of work and relevant to the Insurance Sector	10.00	10.00
			The proposal partially covers the scope of work and relevant to the Insurance Sector	5.00	
			The proposal does not cover the scope of work and not relevant to the Insurance Sector	0.00	
2	Problem Statement				

	2.1	Does the problem statement follow clearly from the survey of the literature?	The problem statement fully follows from the survey of the literature	5.00	5.00
			The problem statement partially follows from the survey of the literature	2.50	
			The problem statement does not follow from the survey of the literature	0.00	
	2.2	Is the problem or opportunity to be addressed by the proposed project clearly identified, outlined, and explained?	The problem/opportunity to be addressed by the proposal is identified clearly, outlined, and explained.	5.00	5.00
			The problem/opportunity to be addressed by the proposal is partially identified, outlined, and explained.	2.50	
			The problem/opportunity to be addressed by the proposal is not identified, outlined, and explained.	0.00	
	2.3	Does the project have potential to further advance the insurance research and augment the insurance body of knowledge?	The proposed project demonstrates a full potential to further advance insurance research and augment the insurance body of knowledge.	10.00	10.00
			The proposed project partially demonstrates potential to further advance insurance research and augment the insurance body of knowledge.	5.00	
			The proposed project demonstrates no potential to further advance insurance research and augment the insurance body of knowledge.	0.00	
	3.	Research Aim and Objectives			

	3.1	Do the objectives and plan of operation appear to be sound and appropriate relative to the proposed initiative(s) and the impact anticipated?	The objectives and plan of operation are sound and appropriate to the proposed initiative(s) and the impact anticipated.	10.00	10.00
			The objectives and plan of operation are partially sound and appropriate to the proposed initiative(s) and the impact is partially anticipated.	5.00	
			The objectives and plan of operation are not sound and appropriate to the proposed initiative(s) and there is no impact anticipated.	0.00	
			4. Preliminary Literature Review		
	4.1	Is the preliminary literature relevant to the insurance sector?	The preliminary literature is relevant to the insurance sector	10.00	10.00
			The preliminary literature is not relevant to the insurance sector	0.00	
	5. Methodology				
	5.1	Does the proposal clearly outline the methodology (e.g., design, participants, instruments, procedures)?	The proposal clearly outlines the methodology	10.00	10.00
			The proposal partially outlines the methodology	5.00	
			The proposal does not outline the methodology	0.00	
	6. Project Implementation Plan				
	6.1	Is the project implementation plan sound and achievable?	The implementation plan is sound and achievable.	20.00	20.00
			The implementation plan is partially sound and achievable.	10.00	
			The implementation plan is not sound or achievable.	0.00	
	7. Resources and Capacity				



	7.1	Does the institution have the resources and capacity to undertake the proposed project with an appropriate skilled team?	The institution has fully outlined its resources and capacity to undertake the project with an appropriate skilled team.	10.00	10.00	
			The institution has partially outlined its resources and capacity to undertake the project with an appropriate skilled team.	5.00		
			The institution has not outlined its resources and capacity to undertake the project with an appropriate skilled team.	0.00		
	8.	Partnering and collaborating with other PSET Institutions in the sharing of knowledge and information through research				
	8.1	Is the institution willing to collaborate with other HEIs, SETAs, TVETs etc?	The institution is willing to collaborate with other PSET institutions with a clear outline on potential projects.	10.00	10.00	
			The institution is partially willing to collaborate with other PSET institutions with just an indication to collaborate on potential projects.	5.00		
			The institution is not willing to collaborate with other PSET institutions.	0.00		
	Total				100.00	
	Enquiries or Application submissions to:	Mr E Kaplan at <a href="mailto:ernestk@inseta.org.za">ernestk@inseta.org.za</a> and Mr Z Desai at <a href="mailto:zakariyyad@inseta.org.za">zakariyyad@inseta.org.za</a>				