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BID NUMBER: TENDER-INS/2024/25/008

BID DESCRIPTION – APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF CYBERSECURITY ASSESSMENT SERVICES FOR A PERIOD OF THREE (3) YEARS.

The INSETA calls for suitably qualified service providers to provide Cybersecurity Assessment Services to the Insurance Sector Education and Training Authority for a Period of 3 Years.

Tender documents are obtainable from **18 September 2024** from the following websites:

- **ETender Portal**
- **INSETA Website**

Closing Date: 10 October 2024 at 11:00 am

Delivery: INSETA Office, 18 Fricker Road, Illovo, Sandton.

For enquiries contact the INSETA Supply Chain Management at bids@inseta.org.za

TERMS OF REFERENCE

BID NUMBER: TENDER-INS/2024/25/008
**BID DESCRIPTION – APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF
CYBERSECURITY ASSESSMENT SERVICES FOR A PERIOD OF THREE (3) YEARS.**



1. BACKGROUND

- 1.1** 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.
- 1.2** INSETA hereby invites interested qualified and experienced services providers to submit proposals for the provision of Cybersecurity Assessment Services for a period of three years.

2. SCOPE OF WORK

- 2.1** The appointed Service Provider is expected to perform the following:
- 2.1.1 To annually conduct vulnerability scanning for all Systems and all Devices connected to the INSETA network including cloud services. Thereafter perform vulnerability management and deployment of remediations.
 - 2.1.2 To determine whether INSETA security posture can withstand an intrusion attempt from an advanced attacker with a specific goal.
 - 2.1.3 To identify INSETA's IT infrastructure vulnerabilities and provide remedies.
 - 2.1.4 To determine whether INSETA employees are vulnerable to phishing attacks.
 - 2.1.5 To conduct cybersecurity awareness training.

3. DELIVERABLES

3.1 Cybersecurity

- 3.1.1** Cybersecurity assessment must include the following processes:
- 3.1.1.1 Vulnerability assessment
 - a) Identify and analyse risks, threats, and vulnerabilities.
 - b) Prioritise risks, threats and vulnerabilities based on impact and criticality.
 - c) Report possible threats or software vulnerabilities.
 - d) Perform vulnerability testing, risk analysis and security assessments on the INSETA's IT systems and infrastructure to verify and validate compliance with defined ICT Policies and best practices.
 - e) Provide reports with recommendations for remediations of identified risks, threats and vulnerabilities prioritised based on the impact and criticality.
 - f) Implement remediation and recommendations to mitigate any vulnerabilities.
 - 3.1.1.2 Penetration Tests
 - a) Penetration tests must be conducted on both external and internal perspective to identify areas of vulnerabilities within the existing security measures implemented on the ICT Infrastructure and systems.
 - b) The expected outcome of this process is for the service provider to provide a comprehensive report, with identified vulnerabilities, as well as recommendations.

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c) The assessment should cover the following areas of the ICT Infrastructure and systems as well as processes:

i) External Infrastructure Penetration Testing

IP Addresses

- All Live IP Addresses
- All Public IP Addresses

ii) Internal Infrastructure Penetration Testing

- The estimated number of internal devices are 65 (Switches and Servers).
- The estimated number of endpoint devices are 150.
- The number of site(s) is (1) It must be noted that the service provider will be required to travel to one site only (INSETA Head Office: 18 Fricker Road, Illovo, Sandton, 2196) to access INSETA network.
- Internal IP address range will be provided to the successful bidder.

iii) Website/Web Application Penetration Testing

The number of websites expected to be tested are 15.

iv) Social Engineering Phishing Emails

- INSETA's number of users are 150 and 150 email addresses will be provided to the successful user.

v) Cyber Security awareness training and subscription

- INSETA's number of users for awareness training are 150.

vi) Remedial Actions

- Provide remedial action plan and implement remedial actions.

4 TIMEFRAMES

- 4.1 The duration of the contract will be for a period of three (3) years.
- 4.2 The appointed Service Provider is expected to execute work within one (1) month after both parties have signed a service level agreement.

5 CONTRACTUAL OBLIGATION

- 5.1 Bidders to fully complete SBD 3.1: Pricing Schedule with a fixed total price including all applicable support services. The total price must be inclusive of VAT.
- 5.2 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.

Board Members: Ms. V. Pearson (Organised Employer), Ms. L. van der Merwe (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)

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- 5.3 The bidders are required to provide a dedicated Account Manager upon contracting.
- 5.4 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (**upon parties contracting**).
- 5.5 Bidders should fully comply with the relevant SCM Legislative Framework as well as application of regulatory and prescripts. Bidders are also required to take all reasonable steps to protect information, in line with the provisions of the POPIA.
- 5.6 An alternate replacement of resource(s) should be equal or more competent to the initial approved resource(s).

6 ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 6.1 No legal or other obligation shall arise between the service provider and INSETA unless/until both parties have signed a formal contract or Service Level Agreement in place.
- 6.2 The Contract site is at INSETA (as and when required).

7 WORKMEN AND SUPERVISION ON SITE

- 7.1 The service provider shall be held responsible for the conduct of his employees and the conduct of his sub-contractor's employees for the full duration of the contract.

8 EVALUATION CRITERIA

- 8.1 Responses will be evaluated using a predetermined set of evaluation criteria. The evaluation criteria are designed to reflect the INSETA's requirements in terms of identifying a suitable service provider and ensure the selection process is transparent and affords all the bidders a fair opportunity for evaluation and selection.
- 8.2 **The evaluation criteria will be based on the following phases/requirements:**
 - Phase 0: Administrative requirements
 - Phase 1: Mandatory requirement
 - Phase 2: Technical/Functional Evaluation
 - Phase 3: Evaluation on Price and Specific Goals

9 ADMINISTRATIVE REQUIREMENTS (Phase 0)

- 9.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 9.2 Bidder must complete, sign and submit a Standard Bidding Document (SBD 1) Procurement Invitation.
- 9.3 **Standard Bidding Document (SBD 4) Bidder's Disclosure.**
- 9.4 Standard Bidding Document (SBD 6.1) Preference Points Claim form.
- 9.5 Bidder must provide BBBEE Certificate (accredited by SANAS) or Sworn Affidavit (in as prescribed or CIPC or DTI template).
- 9.6 Initialled General Conditions of Contract (GCC).

10 MANDATORY CRITERIA (Phase 1)

Mandatory criteria description	Comply	Do not comply
The bidder lead resource/technical lead must be a Certified Ethical Hacker. Proof of valid certification must be submitted.		

Note: All bidders who do not comply with the mandatory criteria listed above will be disqualified.

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11 FUNCTIONAL EVALUATION CRITERIA (Phase 2)

11.1 The tender submission will be functionally evaluated out of **100 points on Phase 2 – any bidder who scores less than 70** will not be considered for further evaluation (Phase 3 – Price and Specific Goals).

Category	Description	Weight
Bidder's past experience in delivering Cybersecurity services	<p>The bidder must provide reference letters with appointment letters/purchase orders confirming services were rendered successfully from different clients for similar services as stated in the scope of work. Reference letters must be on referee's letterhead, date (not older than 5 years), signed with contactable detail(s).</p> <ul style="list-style-type: none"> 3 reference letters with appointment letters/purchase orders = 25 points 2 reference letters with appointment letters/purchase orders = 15 points 1 reference letter with appointment letter/purchase order = 5 points Non-compliance/submission of reference letters with no appointment letters/purchase orders = 0 points <p><i>Due diligence will be conducted against reference letters submitted.</i></p>	25
Experience and Qualification of the Project Manager	<p>Bidder to provide the CV/resume of the Project Manager reflecting a minimum of three (3) years' project management / account management experience.</p> <ul style="list-style-type: none"> 5 years and above experience = 10 points 3 – 4 years' experience = 5 points Non-compliance or less than 3 years' experience = 0 points 	10
	<p>Project Manager possess a minimum of an NQF level 6 Diploma/Degree in IT, Project Management, Finance or Business Administration)</p> <ul style="list-style-type: none"> Project Manager with a Degree = 5 points Project Manager with a Diploma = 3 points Non-compliance or no qualifications submitted = 0 points 	5
Capacity of the project management team to manage the cybersecurity: The bidder must attach the short resume of the project team, their qualifications as well as relevant industry certification.	<p>Bidder must provide a Project team that composes with a minimum of a Technical Lead, Penetrative Tester and a Security Engineer. CVs of each member of the project team to be provided.</p> <p>The Technical Lead</p> <ul style="list-style-type: none"> Must have a minimum of three years' work experience in Cybersecurity = 10 Points Provide IT Cybersecurity certificates such as CISSP - Certified Information Systems Security Professional or CISM Cyber Security CompTIA and PenTest+ Information Security CompTIA = 5 points 	45
	<p>The Security Engineer</p> <ul style="list-style-type: none"> Must have a minimum of three years' work experience in Network Security and Cybersecurity = 10 Points Provide IT Cybersecurity certificates such as CISSP - Certified Information Systems Security Professional or CISM Cyber Security CompTIA and PenTest+ Information Security CompTIA or Ethical Hacking Certificate = 5 points 	

	<p>The Penetrative Tester</p> <ul style="list-style-type: none"> • Must have a minimum of three years' work experience in Cybersecurity = 10 Points • Provide IT Cybersecurity certificates such as CISSP - Certified Information Systems Security Professional or CISM Cyber Security CompTIA and PenTest+ Information Security CompTIA or Ethical Hacking Certificate = 5 points 	
Project Methodology and Project Plan	<p>Bidder must submit a proposal that addresses the following:</p> <ul style="list-style-type: none"> • Software to be used and its capabilities = 5 points <p>The bidder must provide a methodology and project plan that covers the following at a minimum:</p> <ul style="list-style-type: none"> • Project Overview = 1 points • Project Scope = 1 points • Objectives = 1 points • Deliverables = 1 points • Timeline = 1 points • Resources Required = 1 points • Success Criteria = 1 points • Risk Management = 1 points • Communication Plan = 1 points • Project Closure = 1 points <p>NB: 0 points will be allocated on each item if not specified on the methodology and approach submitted</p>	15
TOTAL		100

11.2 Bidders are required to pass the minimum threshold of **70 points** on the functional criteria to be considered for the next phase of evaluation which is **phase 3** – Price and Specific Goals.

11.3 Bidders who score less than **70 points** will not be considered for the next phase, thus will be disqualified, and will be declared non-responsive.

12 Price and Specific Points Evaluation (Phase 3)

12.1 Preference Points Applied Against Specific Goals

The tender responses will be evaluated on the **80/20 preference point system for acquisition of goods or services with Rand value equal to or below R50 million.**

12.1.1 The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

12.1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- Price; and
- Specific Goals.

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The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

13 POINTS AWARDED FOR PRICE AND PREFERENCE POINTS

(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_s = Points scored for comparative price of bid under Consideration

P_t = Comparative price of bid under consideration

P_{min} = 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.

14 SPECIFIC GOALS PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

14.1 Table 1: Specific goals for the RFQ or bid process and points claimed are indicated per the table below.

The 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 (80/20-point system)
Black Ownership <ul style="list-style-type: none"> 6 points for 100% black owned 3 points for 75-99% black owned 1 point for 51-74% black owned 	(Maximum points = 6 points)
Women Ownership <ul style="list-style-type: none"> 6 points for 75% - 100% 3 points for 51% - 74% 1 point for below 51% 	(Maximum points = 6 points)
Youth Ownership <ul style="list-style-type: none"> 5 points for 75% - 100% 3 points for 51% - 74% 1 point for Below 51% 	(Maximum points = 5 points)

Company-owned by People with disabilities • 3 points	(Maximum points = 3 points)
Total	20

Note: Evidence to be submitted by Service Providers: Emerging Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) – sworn affidavit (DTI or CIPC Template), Generic entities – B-BBEE certificate (SANAS accredited) and CSD report.

- 14.1 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.
- 14.2 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.

15 Bid Procedure Conditions: Counter Conditions

15.1 Award Criteria:

- 15.1.1 INSETA reserves the right to screen the bidder in terms of its own Bid Evaluation Committee (BEC) before appointment, should such screening results have a negative outcome, the INSETA reserves the right not to award the bid to the subjected/recommended/highest scoring bidder.
- 15.1.2 The INSETA reserve a right not to award a bid to the highest scoring bidder but to award to a service provider who meet the requirement fully.
- 15.1.3 INSETA reserve a right to conduct due diligence to confirm the contactable reference letters / reference documents provided. The due diligence method will be determined by the INSETA which may include requesting reference letters from the referee.
- 15.1.4 The INSETA draws the bidders' attention that amendments to any of the Bid Conditions or setting of counter conditions by bidders will result in the invalidation of such bids.

16 When bidding as the following:

16.1 Consortium

- 16.1.1 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.
- 16.1.2 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.
- 16.1.3 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 an 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)

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b) Partner

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

16.1.4 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 BBBEE status level 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.

16.1.5 Of importance is that in a consortium, each individual team members retain their identities.

16.2 A joint venture

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

16.3 Unincorporated joint venture:

16.3.1 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 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.

16.4 Incorporated joint venture:

16.4.1 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.

17 COMMUNICATION

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.**

18 CONDITIONS TO BE OBSERVED WHEN BIDDING

18.1 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:

- 18.2 Not evaluate and award a bid that do not comply strictly with this BID document.
- 18.3 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.
- 18.4 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.
- 18.5 Cancel this BID at any time as prescribed in the PPPFA.
- 18.6 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.

19 COST OF BIDDING

19.1 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.

20 NOTE TO BIDDERS:

20.1 Due diligence to be conducted by INSETA prior to the award of the contract.

END OF TERMS OF REFERENCE DOCUMENT