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**ADVERTISEMENT FOR A RESEARCH SERVICE PROVIDER TO PRODUCE THE INSETA SECTOR  
SKILLS PLAN FOR 2025 AND 2026**

EXPRESSION OF INTEREST (EOI) FOR THE APPOINTMENT OF A SUITABLE SERVICE PROVIDER TO CONDUCT SECTOR SKILLS PLAN RESEARCH AND PREPARE SUBMISSION TO THE SETA SUPPORT DIRECTORATE AT THE DEPARTMENT OF HIGHER EDUCATION AND TRAINING FOR THE 15<sup>TH</sup> OF JUNE AND 1<sup>ST</sup> AUGUST 2025 AND 2026 SUBMISSIONS (PERIOD OF 2 YEARS).

**The Insurance Sector Education and Training Authority (INSETA), hereby invites interested public institutions and experienced research service providers/research houses to assist in contributing to the INSETA Research Agenda by conducting the Sector Skills Plan research and prepare the submission to the Department of Higher Education and Training (DHET).**

**Please Note:**

1. All public institutions and private research companies 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 between public institutions and private companies in submission of EOIs are encouraged due to INSETA's mandate to link public institutions with the private sector.
5. This EOI is subject to a compulsory briefing session scheduled to take place virtually on MS Teams on the 30 October 2024 at 11h00 – 12h00. Kindly contact the relevant personnel below to gain access to the meeting link.

**Submit your Expression of Interest (EOI) together with the attached EOI Reply back form  
(must be signed) 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:**

**Mr Ernest Kaplan at [ernestk@inseta.org.za](mailto:ernestk@inseta.org.za) and Mr Zakariyya Desai at  
[zakariyyad@inseta.org.za](mailto:zakariyyad@inseta.org.za)**



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**SUMMARY OF APPLICATION**

DEVELOPMENT OF THE INSETA SECTOR SKILLS PLAN	
<b>DETAILS</b>	<b>DEVELOPMENT OF THE INSETA SECTOR SKILLS PLAN</b>
<b>Background</b>	<p>The Insurance Sector Education and Training Authority (INSETA) is a public entity listed in schedule 3A of the Public Finance Management Act (PFMA) and was established in March 2000. The INSETA must, in accordance with any prescribed requirements, perform in accordance with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), and any other relevant legislation and the Constitution.</p> <p>The functions and duties of the SETAs in terms of the <i>Skills Development Act</i> and <i>Skills Development Levies Act</i> are the following:</p> <ul style="list-style-type: none"> <li>▪ Develop a sector skills plan.</li> <li>▪ Implement its sector skills plan.</li> </ul>
<b>Purpose</b>	<p>The Insurance Sector Education and Training Authority (INSETA), hereby invites interested and experienced public institutions and/or private research companies/research houses to apply to be considered for conceptualizing and writing-up and finalizing the Sector Skills Plan for submission to the Department of Higher Education and Training in June and August of the years 2025 and 2026.</p>
<b>Deliverables</b>	<p><b>1. The Service Provider will be responsible for:</b></p> <p>1.1 The overall responsibility for the meeting of the deliverables lies with the research service provider. The service provider will be expected to write-up the Sector Skills Plan in accordance with the newly approved framework and guidelines covering the period 2025-2030. A copy of which is attached to this Expression of Interest.</p> <p>1.2 The research service provider will also be accountable for:</p>

	<p>1.2.1 Ensuring that the DHET Sector Skills plan framework and guidelines are followed accurately to ensure that all the deliverables are met.</p> <p>1.2.2 Ensuring that the areas of research being conducted will address the Research Process and Methods section as well the six chapters of the Sector Skills Plan:</p> <ul style="list-style-type: none"> <li>Chapter 1: Sector Profile</li> <li>Chapter 2: Key Skills Change Drivers</li> <li>Chapter 3: Sectoral Skills Demand and Supply</li> <li>Chapter 4: Seta Partnerships</li> <li>Chapter 5: Seta Monitoring and Evaluation</li> <li>Chapter 6: Seta Strategic Skills Priority Actions</li> </ul> <p>* Note: A copy of the 1 August 2024 Sector Skills Plan is attached to this Expression of Interest.</p> <p>1.2.3 In addition, further deliverables include the following:</p> <ul style="list-style-type: none"> <li>1.2.3.1 Collating all the primary and secondary data for the above chapters.</li> <li>1.2.3.2 Assisting with statistical trends analysis obtained from the Annual Training Report data from 2024 and 2025 and the and the Workplace Skills Plan data from 2025 and 2026.</li> <li>1.2.3.3 Interviewing the Managers of the core INSETA divisions: ETQA, Learning, and Special Projects according to the framework and guidelines assigned to each chapter and incorporating their inputs into the Sector Skills Plan.</li> <li>1.2.3.4 Facilitating focus group discussions to identify sectoral priority and new and emerging occupations as well as skills gaps which need to be included in the Sector Skills Plan.</li> <li>1.2.3.5 Consulting professional associations and industry bodies for compiling standard industrial classification (Sic) code input into the Sector Skills Plan.</li> <li>1.2.3.6 Assisting INSETA to obtain skills supply and demand data and study skills mismatches.</li> </ul>
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	<p>1.2.3.7 Referring to key legislation and legislative frameworks such as: Skills Development Act, National Development Plan (NDP), National Skills Development Plan (NSDP), National Growth Plan (NGP), Human Resource Development Strategy (HRDSA), Economic Reconstruction and Recovery Plan (ERRP), Presidential Youth Employment Initiative (PYEI), and the White Paper on Post-School Education and Training.</p> <p>1.2.3.8 Providing a summary of skills priorities and actions derived from Chapters 1-5 of the Sector Skills Plan.</p> <p>1.2.3.9 Providing input into the Research Agenda and the Continuous Improvement Plan (CIP).</p> <p>1.2.3.10 Attending and presenting the Sector Skills Plan at Sector Skills Plan workshops and Research and Learning committee meetings.</p>
<p><b>Funding Window</b> <b>Opened</b></p>	<p><i>The Funding Window will open on the 18<sup>th</sup> of October and will close on the 31<sup>st</sup> of October 2024.</i></p>
<p><b>Contract Duration</b></p>	<p>The duration of the contract will be for a period of 2 years (24 Months), with annual renewals subject to satisfactory performance evaluation by the INSETA.</p>
<p><b>Details of the Proposal</b></p>	<p>The service provider must provide the INSETA with a Lead Researcher with the following qualifications and experience:</p> <ul style="list-style-type: none"> <li>▪ Minimum of a master’s degree in any of the related fields of Social Sciences, Education, Economics or Statistics.</li> <li>▪ Have experience in writing for the education / financial / insurance industry (5+ years).</li> <li>▪ The Lead Researcher must have conducted previous research in the Insurance and Financial Related Services sector.</li> <li>▪ Excellent communication, conceptualization and report-writing skills.</li> <li>▪ NB: Experience should be in a table format with contactable references, for example: Name of institution, title of the study, year conducted, year completed, and purpose of the study, contactable reference names, and contact details.</li> <li>▪ Submit minimum of (3) Reference Letters relevant to the project and contactable clients that were serviced in the past 5 years.</li> <li>▪ The proposal must include:</li> </ul>

- Project Implementation Plan outlining research methodology and project outputs
- Funding plan in relation to the project plan

*Interested parties are requested to follow the response format specified below.*

The schedule must be clearly marked, indexed and /or clearly referenced):

**Schedule:**

1. Cover Page: The cover page must clearly indicate the name of the institution/company. The cover letter should be brief (not more than two pages).
2. Executive Summary: Describe why your institution should be considered as the best qualified to achieve the services enlisted in this expression of interest. Brief institutional/company profile (not more than five pages).
3. Experience: Submit a detailed list of similar services/appointments completed, supported by reference letters for each/respective service/appointment listed above.
4. Qualifications and Experience: This subsection must contain relevant information on qualifications and experience of the project team as follows:
  - a. 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.
  - b. Qualifications and Experience: This section must contain relevant information on the qualifications and experience related to the project team and proposed project partner.

	<p>5. Signature Requirements: Proposals must be accompanied by the EOI 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.</p>
<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, as well as a project plan. Funding will cover completed research deliverables produced to the satisfaction of INSETA.
<b>Enquiries or Application submissions to:</b>	Mr. Ernest Kaplan at <a href="mailto:ernestk@inseta.org.za">ernestk@inseta.org.za</a> and Mr. Zakariyya Desai at <a href="mailto:zakariyyad@inseta.org.za">zakariyyad@inseta.org.za</a>



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Funding is available through Discretionary Grants.