

PROVISION OF B-BBEE ADVISORY SERVICE

RFQ	RFQ/INS/2024/25/113
RFQ ISSUE DATE	19 FEBRUARY 2025
BRIEFING SESSION	N/A
RFQ DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR A PERIOD OF THREE (3) YEARS TO REVIEW THE INSETA READINESS FOR BROAD- BASED BLACK ECONOMIC EMPOWERMENT (B-BBEE) AND ADVISE ON REMEDIAL ACTIONS TO CLOSE IDENTIFIED GAPS.
CLOSING DATE & TIME	25 FEBRUARY 2025 at 11h00
LOCATION FOR SUBMISSIONS	rfqs@inseta.org.za

Bidders must submit responses via e-mail at: rfqs@inseta.org.za

For any queries or questions, please use the 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: 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),

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CEO: Ms. G. Mkhize

1. BACKGROUND

11.1 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 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.

2. PURPOSE

11.1 INSETA intends to appoint an experienced, accredited and qualified service provider for the period of three (3) years to review the INSETA readiness in compliance with Broad- Based Black Economic Empowerment (B-BBEE) advise on remedial actions to close identified gaps and assist with the implementation thereof. The supplier will be required to gather all information and align it accordingly in preparation for the BBBEE verification process)

3. OBJECTIVES

- 3.1 Assist with the development of INSETA BBBEE compliance framework.
- 3.2 To evaluate INSETA's mandate and assist on the use of its budget for supplier development in compliance with the BBBEE act.
- 3.3 To evaluate INSETA programs / projects and advise on those that must be considered for BBBEE compliance (i.e. Co-ops, SMME development, supplier training workshops, SCM supplier training).
- 3.4 To develop standardised criteria to benchmark, monitor, review, evaluate and report compliance to B-BBEE Act, Codes of Good Practice (COGP) and PPAA imperatives.
- 3.5 To advise INSETA on the BBBEE compliance initiatives.

4. SCOPE OF WORK

To achieve the above objectives, a competent service provider is required to provide the following:

- 4.1 Undertake an analysis of a comprehensive state of INSETA readiness for and the extent of B-BBEE in its value chain.
- 4.2 Compile reports on INSETA programmes and their impact on reporting on B-BBEE compliance.
- 4.3 Develop an empowerment measurement framework to benchmark, monitor, review, evaluate and report on compliance to B-BBEE Act, Codes of Good Practice (COGP) and PPPFA imperatives.
- 4.4 Conduct workshops to enhance the INSETA's internal capacity on the implementation of the evaluation and monitoring of B-BBEE Act
- 4.5 Use the previous B-BBEE audit outcome reports as a base to improve INSETA B-BBEE position in terms of Level contributor.

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- 4.6 The Service Provider must also develop reporting template for the fulfilment of the all B-BBEE pillars.
- 4.7 The Service Provider will be required to assist in improving the current INSETA B-BBEE level contributor.
- 4.8 Capacitate all departmental contributors on areas that are identified in the analysis and assist the organization in conducting continuous monitoring leading to the assessment phase.

5. DELIVERABLES

The successful service provider must evaluate INSETA compliance with Broad-Black Based Economic Empowerment Act No 53 of 2003, on the main pillars and establish BBBEE compliance improvement strategies as indicated below:

- 11.1 Ownership;
- 11.2 Management Control;
- 11.3 Employment Equity;
- 11.4 Enterprise Development; (Co-ops and SMME development programs by INSETA)
- 11.5 Procurement; (Based on the 10% plus the portion of Discretionary Grants that goes through procurement / SCM / catalytic)
- 11.6 Skills Development; (Based on the 10% plus the portion of Discretionary Grants that goes through procurement / SCM / catalytic).

6. EVALUATION CRITERIA:

6.1 The evaluation criteria will be based on the following requirements:

- Phase 0: Administrative requirements
- Phase 1: Mandatory requirement
- Phase 2: Evaluation of Specific Goals and Price

7. ADMINISTRATIVE CRITERIA

- 11.1 Proof of registration on CSD (**Central Supplier Database**)
- 11.2 Bidder must provide proof (BBBEE Certificate accredited by SANAS or BBBE)
- 11.3 Department of Trade Industry (DTI) Sworn Affidavit template)

8. MANDATORY CRITERIA

- 8.1 **Company Profile:** Service providers must provide a company profile, indicating that they have been providing BBBEE compliance and improvement services for the minimum period of three (3) years within the public sector.

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- 8.2 Company Experience (Track Record):** Submit minimum of three (3) reference letters from a client, indicating provision of similar services (the reference letter must be in the client's letterhead and signed).
- 8.3 Project Manager:** CV of the Project Manager with minimum of 5 years' relevant post qualification experience (Business B-BBEE Compliance services) and proof of a minimum qualification at NQF Level 6 (Proof of qualification must be submitted).
- 8.4 Project Methodology:** Bidder must submit detailed project approach, project plan with intermediate, final outputs and identified timeframes/ milestones.
- 8.5 BEE Consultancy Services Certificate:** SANAS Valid Accreditation certificate to provide B-BBEE Consultancy (Proof of certificate to be submitted).

NB: Failure to comply with the mandatory requirements will lead to disqualification.

9. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 9.1** 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.
- 9.2** The Contract site is at **INSETA**.

10. WORKMEN AND SUPERVISION ON SITE

- 11.1** 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.

11. PRICING SCHEDULE

- 11.1** The bidder must ensure that the price quotations are inclusive of all applicable taxes (including VAT)
- 11.2** The service provider should provide the hourly rates as follows:

Description	Rate per hour Year 1	Rate per hour Year 2	Rate per hour Year 3
Advisory Services	R	R	R
VAT at 15%	R	R	R
Total	R	R	R
TOTAL RATE PER HOUR FOR 3 YEARS			R

NB A quotation must in a company letterhead

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12. POINTS AWARDED FOR PRICE AND SPECIFIC GOALS

The **80/20** preference point system

A maximum of **80** points is allocated for price on the following basis:

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

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

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13. B-BBEE PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

B-BBEE Status Level of contributor	Number of points 80/20 system
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- 11.1** 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.
- 11.2** Bidders other than EME's or QSE's must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B- BBEE rating issued by SANAS.
- 11.3** Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

14. Consortium

- 11.1** 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.
- 11.2** 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 endeavor, particularly the division of profits. A consortium is formed by contract, which designates the rights and obligations of each member.
- 11.3** 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 a RFQ/Bid process is such that the lead partner is identified and the following requirements are required as follows:

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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

11.4 A joint venture

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

11.5 Unincorporated joint venture:

14.5.1 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.

11.6 Incorporated joint venture

14.6.1 This is 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.

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The required compliance documents must be completed 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.

14.6.2 A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder qualifies for, unless the intended Sub-contractor is an EME that has the capacity and the ability to execute the sub-contract.

14.6.3 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capacity and the ability to execute the sub-contract.

15. COMMUNICATION

11.1 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/RFQ should be emailed **three days before the closing date** at rfqs@inseta.org.za

16. CONDITIONS TO BE OBSERVED WHEN BIDDING

11.1 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.

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

11.3 The competition shall remain open for acceptance by the Organization for a period of **90 days** from the closing date of the BID Enquiry.

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INSETA reserves the right to:

- 11.4** Not evaluate and award a bid that does not comply strictly with this BID document.
- 11.5** 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.
- 11.6** 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.

17. Cost of Bidding

- 11.1** 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.

END OF TERMS OF REFERENCE DOCUMENT

Annexed to this document for completion and return with the document:

SBD 4 (Bidders Disclosure)
SBD 6.1
General Conditions of Contract (GCC) initialed
BBBE certificate or Sworn Affidavit

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