inseta
INSURANCE SECTOR EDUCATION AND TRAINING AUTHORITY

*EMPOWERED TO **INFLUENCE** AND **INSPIRE!***

18 Fricker Road,
Illovo, Sandton 2196
P.O. Box 32035, Braamfontein 2017

Telephone: 011 381 8900
Website: www.inseta.org.za

REQUEST FOR QUOTATION (RFQ)

RFQ	**RFQ/INS/2026/27/0003**
RFQ ISSUE DATE	**14 April 2026**
BRIEFING SESSION	**N/A**
RFQ DESCRIPTION	**APPOINTMENT OF A PANEL OF SUBJECT EXPERTS / PROFESSIONAL BODIES TO PROVIDE ASSESSMENT SERVICES RELATED TO EXTERNAL INTEGRATED SUMMATIVE ASSESSMENTS (EISA) EXAMINATION SCRIPT MARKING FOR LISTED OCCUPATIONAL QUALIFICATIONS - FOR A PERIOD OF TWELVE (12) MONTHS**
CLOSING DATE & TIME	**17 April 2026 @11:00**
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: ______________________________

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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 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 requests experienced and reputable bidders to submit a response to this request for quotation (RFQ) for the appointment of a panel for the provision of assessment services for the External Integrated Summative Assessments (EISA) Exams for a period of twelve (12) months. These services include:

1.2.1. Marking & Moderation of EISA Exam Scripts (on demand – maximum 2 x sessions)

2. SCOPE OF WORK AND DELIVERABLES

2.1. **Scope of Work (on demand) – Bidders can apply for ALL or a selection of Occupational Qualifications for script marking services. Use the correct quotation template(s) when submitting bids.**

2.1.1. Services (2 x exam sessions) include:

a) Provision of exam script marking services for EISA exams
b) Provision of exam script moderation services for EISA exams
c) Administration services:
d) Prepare script marking and moderation report.
e) Attend Memo Discussion meeting pre-marking and moderation.
f) Attend exam results moderation meeting post marking and moderation.
g) Safe keeping and storage of exam scripts during marking and moderation process.

2.2. **Deliverables:**

2.2.1. Script Marking Services (2 x Exams)

a) Developing marking reports for each of the occupational qualifications marked.
b) Developing marking moderation reports for each of the qualifications moderated.
c) Marking of examination scripts for various occupational qualifications (100%)
d) Script marking marksheets for each occupational qualification marked..
e) Moderation of marked scripts for various occupational qualifications (minimum 30%).
f) Marking/Moderation Reports to be conducted at **INSETA offices.**

3. EVALUATION

The evaluation criteria will be based on the following requirements:

- Phase 0: Administrative requirements.
- Phase 1: Mandatory Requirements

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- Phase 2: Evaluation of Price and Specific Goals.

3.1. **ADMINISTRATIVE CRITERIA (Phase 0)**

a. Bidder must submit proof of registration on CSD (**Central Supplier Database**).

Bidder must submit fully completed and signed bid documents.

b. Standard Bidding Document **(SBD 4) Bidder's Disclosure.**

c. **SBD 6.1** Preference Points Claim form.

d. General Conditions of Contract **(GCC)** initialled on each page.

e. Bidder must provide **BBBEE Certificate** (accredited by SANAS) or **Sworn Affidavit** (in as prescribed or CIPC or DTI template).

f. Signed Request for Quotation **(RFQ)** form.

4. MANDATORY REQUIREMENTS

4.1. The bidder's Script Marker must have:

a) A minimum of three (3) years professional experience in the Insurance sector and that experience may include any but not limited to the following:

- Underwriting (Short Term Insurance, Long Term Insurance, Medical Insurance)
- Claims Assessing (Short Term Insurance, Long Term Insurance, Medical Insurance)
- Long Term Insurance Advisor
- Financial Advisor
- Health care benefits advisor
- Investment Advisor
- Employee and Pension Funds Benefits Advisor

NB: (Certified ID Copy, Highest Qualification & CV must be provided).

b) Any Insurance qualification at minimum NQF Level 5 or above (copy of qualification must be provided).

4.2. The bidder's proposed Moderator must have or be:

a) A minimum of three (3) years professional experience in the Insurance sector and that experience may include any but not limited to the following:

- Underwriting (Short Term Insurance, Long Term Insurance, Medical Insurance)
- Claims Assessing (Short Term Insurance, Long Term Insurance, Medical Insurance)
- Long Term Insurance Advisor
- Financial Advisor
- Health care benefits advisor
- Investment Advisor
- Employee and Pension Funds Benefits Advisor

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NB: (Certified ID Copy, Highest Qualification & CV must be provided).

b) Any Insurance qualification at minimum NQF Level 5 or above (copy of qualification must be provided).

5. PRICING CONSIDERATIONS

No	Qualification Name	SAQA ID	Credits	EISA Duration	Total Allocated Marks	Price Per Script
1	Occupational Certificate: Employee and Pension Fund Benefit Adviser	105025	110	1 Hrs	33 Marks	R__________
2	Occupational Certificate: Financial Advisor	105026	515	5 Hrs	146 Marks	R__________
3	Occupational Certificate: Health Care Benefits Advisor	105030	102	1 Hr	33 Marks	R__________
4	Occupational Certificate: Insurance Underwriter	117329	163	3 Hrs	120 Marks	R__________
5	Occupational Certificate: Investment Adviser	105021	213	1.5 Hrs	40 Marks	R__________
6	Occupational Certificate: Long Term Insurance Adviser	105022	180	1.5 Hrs	40 Marks	R__________
7	Occupational Certificate: Insurance Agent-Insurance Underwriter	91784	156	3 Hrs	120 Marks	R__________
8	Occupational Certificate: Insurance Claims Administrator (Insurance Claims Assessor)	99668	131	3 Hrs	100 Marks	R__________
9	Moderation Services Per Script	n/a				R__________
10	Report Compilation	n/a				R__________

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6. CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

6.1. All prices indicated in the pricing schedule must remain fixed for the period of the contract.

6.2. Compliance with the general conditions of contract.

6.3. SBD 7.2 will be the standard contract used for contract and the bidders approved proposal will be an Annexure to the contract for term contracts.

6.4. Bidders are required to fully comply with the relevant SCM Legislative Framework as well as applicable applications of regulatory prescripts.

6.5. 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.

6.6. Bidder must adhere to Protection of Personal Information (POPI) Act.

7. ADJUDICATION USING A POINT SYSTEM

7.1. The bidder obtaining the highest number of total points will be awarded the contract unless objective criteria justify the award to another bidder.

7.2. Preference points shall be calculated after process has been brought to a comparative basis taking into account all factors of non-firm prices.

7.3. In the event that two or more bids have scored equal points in terms of price and preference points for Specific Goals, the successful bid must be the one scoring the highest number of preference points for Specific Goals- in terms of PPPFA Act 5 of 2000.

7.4. However, when functionality is part of the evaluation process and two or more bids have scored equal points for Specific Goals, the successful bid must be the one scoring the highest score for functionality.

7.5. Should two or more bids be equal in all respect, the award shall be decided by the drawing of lots.

8. POINTS AWARDED FOR PRICE AND PREFERENCE POINT

(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:

Ps = 80 {1- (Pt – P min)}

P min Where:

Ps	=	Points scored for comparative price of bid under Consideration
Pt	=	Comparative price of bid under consideration
Pmin	=	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

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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.

9. SPECIFIC GOALS POINTS WILL BE WARDED AS FOLLOWS:

9.1. Table 1: Specific goals for the RFQ or bid process and points claimed are indicated per the table below. ***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 • 6 points for 100% • 3 points for 75-99% • 1 point for 51-74%	(Maximum points = 6 points)
Women Ownership • 6 points for 75% - 100% • 3 points for 51% - 74% • 1 point for below 51%	(Maximum points = 6 points)
Youth Ownership • 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.

9.1.1 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.

9.1.2 The organ of state reserves the right to require a tenderer, either before a tender is adjudicated or

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at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

9.1.3 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.

9.1.4 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.

9.1.5 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.

9.1.6 Bidders other than EME's or QSE's must submit their original and valid B-BBEE status level verification certificate and BBBEE Scorecard, substantiating their B-BBEE rating and black ownership issued by SANAS.

9.1.7 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.

9.2. **Consortium**

9.2.1. 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.

9.2.2. 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 delignates the rights and obligations of each member.

9.2.3. 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:

9.2.3.1. Lead Partner

a. All administrative documents (consortium agreement between the lead partner and the partner).

b. 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).

9.2.3.2. Partner

a. Proof of CSD registration.

b. Tax Pin.

c. BBBEE Sworn-Affidavit.

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d. SBD 4

9.2.4. 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 specific goals 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.

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

9.3. **A joint venture**

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

9.4. **Unincorporated joint venture**:

9.4.1. 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

- SBD 4
- SBD 6
- Tax pin
- CSD registration.
- The JV agreement will direct which bank account of the two entities will be used.
- Consolidated Joint BBBEE Certificate.

9.5. **Incorporated joint venture**

9.5.1. 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 completed by the entity/ company the name of the joint venture, and the following will be required amongst others

- SBD 4
- SBD 6
- Tax pin
- CSD registration.
- The JV agreement will direct which bank account of the two entities will be used.
- Consolidated Joint BBBEE Certificate.

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10. CONDITIONS TO BE OBSERVED WHEN BIDDING

- 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 **90 days** from the closing date of the BID Enquiry.

INSETA reserves the right to:

10.1. Not evaluate and award a bid that do not comply strictly with this BID document.

10.2. 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.

10.3. 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.

10.4. Cancel this BID at any time as prescribed in the PPPFA.

10.5. Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the of cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

11. 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.

12. COMMUNICATION

12.1. 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 should be emailed ***three days before the closing date.***

13. ANONYMOUSLY REPORTING OF FRAUD

Bidders are encouraged to report any incidents of • fraud • corruption • theft • misconduct or •unethical behaviour to the Vuvuzela Hotline. **Contact number: 0800 119 691**

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14. NOTE TO BIDDERS

14.1. Due diligence to be conducted by INSETA prior to the award of the contract – where applicable.

END OF DOCUMENT