

REQUEST FOR QUOTATION (RFQ)

RFQ	RFQ/INS/2026/2027/0018
RFQ DESCRIPTION	APPOINTMENT OF A PANEL OR FRAMEWORK FOR SUBJECT MATTER EXPERTS (SMEs) TO DEVELOP INSTRUMENTS & TOOLS FOR IMPLEMENTATION OF EXTERNAL INTEGRATED SUMMATIVE ASSESSMENTS (EISA) EXAMINATIONS FOR REGISTERED OCCUPATIONAL QUALIFICATIONS.
RFQ ISSUE DATE	18 June 2026
BRIEFING SESSION	N/A
CLOSING DATE & TIME	25 June 2026 at 11:00 am Late submissions will not be considered.
SUBMISSION METHOD	rfqs@inseta.org.za For any queries or questions, please use the above-mentioned email address.
RFQ VALIDITY PERIOD	90 days

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: _____

E-MAIL ADDRESS: _____

CONTACT PERSON: _____

CELL NO: _____

SIGNATURE OF BIDDER : _____

1. BACKGROUND

- 1.1. The Insurance Sector Education and Training Authority (INSETA) is a Schedule 3A public entity established in terms of the Skills Development Act. INSETA is mandated to promote skills development within the insurance and related financial services sector in South Africa.
- 1.2. The Quality Council for Trades and Occupations (QCTO) is a regulated body that quality assures the provision of Occupations Qualifications (OQs) in South Africa. The INSETA/QCTO Service Level Agreement (SLA) signed in December 2020 mandates INSETA as a QCTO delegated Development Quality Partners (DQP) as well as an Assessment Quality Partner (AQP) to among other:
 - 1.2.1. Develop, review and implement the roll-out of Occupation Qualifications for implementations by delegated bodies.
 - 1.2.2. Manage the implementation of External Integrated Summative Assessments (EISA) examinations for OQs.
 - 1.2.3. Recommend Skills Development Providers (SDPs) as well as suitable Assessment Centres to host EISA examinations.

2. PURPOSE

- 2.1. The purpose of the project is to enable INSETA to fully implement Occupations Qualifications in-line with its mandate as a QCTO delegated AQP. The SME will be contracted to provide the following services:
- 2.2. Develop banks of 6 x unique EISA ready examination instruments/tools for each or any of the twelve (12) registered OQs – see list below:

TABLE 1

SAQA ID Code	Qualification Title
91784	Occupational Certificate: Insurance Agent – Insurance Underwriter
117329	Occupational Certificate: Insurance Agent – Insurance Underwriter (REVIEWED)
99668	Occupational Certificate: Claims Administration – Claims Assessor
105026	Occupational Certificate: Financial Advisor
105030	Occupational Certificate: Health Care Benefits Advisor
105022	Occupational Certificate: Long-Term Insurance Advisor
105025	Occupational Certificate: Employee and Pension Fund Benefits Advisor
105021	Occupational Certificate: Investment Advisor
99574	Occupational Certificate: Professional Principal Executive Officer(trustee)
93602	Occupational Certificate: Professional Principal Executive Officer
94222	Occupational Certificate: Organisational Risk Practitioner
97387	Occupational Certificate: Organisational Risk Manager

Board Members: Ms. R. Matenche (Chairperson), Mr. J.J.M. Mabena (Commercial), Mr. C.B. Botha (Commercial), Mr. S.B. Mthethwa (Commercial), Ms. N.M. Nxele (Employer), Mr. S.M. Mpuu (Professional Bodies), Ms. A.S. Khoza (Employer), Ms. M.R. Rauleka (Commercial), Mr. B.A. Monedi (Commercial), Ms. S.A. Anders (Commercial)

CEO: Ms. G. Mkhize

NB: post development, SME must prepare development reports (Examiner) and moderations reports for each **or any of the 6 question/model answer papers in the bank.**

- 2.3. Therefore, INSETA wishes to appoint a service provider subject Matter Experts (SMEs) to develop EISA ready examination instruments and tools for twelve (12) registered OQs and provide examiner/development reports related to instrument development and moderation processes.
- 2.4. Appoint Subject Matter Experts (SMEs) to develop banks of examination ready question papers and model answers in line with the associated OQ blueprint for each qualification. INSETA will provide to the SME the related blueprint for each qualification.

3. LEGISLATIVE AND REGULATORY FRAMEWORK

- 3.1. This bid and all contracts emanating therefrom will be subject to General Conditions of Contract issued in accordance with Treasury Regulation 16A (downloadable GCC) published in terms of the Public Finance Management Act, 1999 (Act 1 of 1999) (PFMA), as well as the Preferential Procurement Policy Framework Act 2000 (PPFA) with its latest Preferential Procurement Regulation (PPR), 2022.

4. SCOPE OF WORK

- 4.1. Development of Banks of EISA Instruments/Tools for each or any of the (12) OQs:
 - 4.1.1. Develop a bank of 6 x unique EISA ready instruments (question papers) for each or any the listed OQs.
 - 4.1.2. Develop a bank of 6 x unique EISA ready tools (model answers) for each or any of the OQs listed above.
 - 4.1.3. The instruments/tools must comply with the Qualification Assessment Specification (QAS Addendum) for each OQ. The QAS addendum is a blueprint used to develop instruments for each OQ. The QAS addendum will be provided by INSETA to the selected SME(s).
 - 4.1.4. The SME must submit to INSETA a project plan highlighting timeline. INSETA envisages that the upcoming of EISA exams will be at the end of October 2026
 - 4.1.5. The SME must also be prepared to sign an INSETA confidentiality agreement. The confidentiality agreement will be provided by INSETA to the selected SME(s).

5. DELIVERABLES

As and when required, related to the development of instruments & tools, the service provider SME must:

- 5.1. Deliver to INSETA 6 x unique EISA ready EISA examination instruments and tools for each OQ.
- 5.2. The service provider SME submit to INSETA signed development reports for each question paper/answer set.

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- 5.3. The service provider SME must submit to INSETA a development project plan highlighting deadline.

6. KEY PERFORMANCE INDICATORS

Key Responsibilities	Activities	Results Indicators (Including all applicable evidence to substantiate against all key responsibilities)
Submit profiles of EISA instrument developer(s) for each paper & OQ.	Recruit experts with experience on assessment instruments development who will develop the instruments for each OQ.	Profiles (CVs), recent certified ID Copies, appointment letter of Developers and signed INSETA non-disclosure agreement.
Submit profiles of EISA instrument moderator(s) for each paper & OQ.	Recruit experts that will moderate the instruments for quality, correctness, and suitability for each OQ.	Profiles (CVs), recent certified ID Copies, appointment letter of Moderators and signed INSETA non-disclosure agreement.
Develop and moderate 6 or any unique instruments per OQ.	Develop, moderate, and submit final instruments/tools per INSETA OQ prioritisation and timelines.	EISA bank approved by INSETA
Submit to INSETA instrument reports for each paper/ OQ developed and moderated.		Development reports signed by developer and moderator.

7. GUIDELINES FOR PANEL FRAMEWORK (RFQ) where applicable

- 7.1. Provider panel will be comprised of the **top 3 bidders** post the scoring process (except for lawful pas-over).
- 7.2. The allocation/briefing/contracting of service providers for a specific work assignment will be facilitated by the SCM division.
- 7.3. Work will be allocated on a **competitive basis** amongst the Service Providers on the Panel.
- 7.4. Service Providers on the panel are not guaranteed any specific work assignments during the tenure of this contract.

8. GUIDELINES FOR PANEL FRAMEWORK (ROTATION) where applicable

- 8.1. Provider panel will be comprised of the **top 3 bidders** post the scoring process (except for lawful pas-over).

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- 8.2. The allocation/briefing/contracting of service providers for a specific work assignment will be on rotational basis and be facilitated by the SCM division as the price for the bidders in the panel is standardised/will be standardised.
- 8.3. Work will be allocated on a rotational basis and where work volumes are confirmed to be too high, multiple Services Providers may be appointed at the same time to deal with the demand. The aim is to ensure that the contract budget is spent amongst all Service Providers in the panel.

9. EVALUATION CRITERIA

9.1. LEGISLATIVE REQUIREMENTS (Phase 1)

Bidder(s) must submit:

- 9.1.1. Completed and Signed RFQ Form Document.
- 9.1.2. Quotation on the bidder letterhead.
- 9.1.3. Completed and Signed Standard Bidding Document (**SBD 4 Bidder's Disclosure**).

Failure to comply with (or submit) the legislative requirements listed above will result in the bidder being non-responsive and result in disqualification.

- 9.1.4. The non-submission of the following legislative requirements will not lead to disqualification.
- 9.1.5. Completed and Signed Standard Bidding Document (SBD 6.1) Preference Points Claim form.
- 9.1.6. Bidder must provide valid BBBEE Certificate or Sworn Affidavit.
- 9.1.7. Central Supplier Database (CSD) Report.

- ***INSETA may contact bidders in case clarification is required in relation to paragraph 6.1.4.***
- ***Failure to comply with the requirement above within 7 working days after being informed will lead to invalidation of your bid.***

9.2. FUNCTIONALITY CRITERIA (Phase 2)

Responses will be evaluated using a predetermined set of evaluation criteria. The evaluation criteria are designed to reflect INSETA's requirements in terms of identifying a suitable service provider and ensuring the selection process is transparent and affords all the bidders a fair opportunity for evaluation and selection.

NO	DESCRIPTION	POINTS
1	COMPANY EXPERIENCE	10
The bidder must demonstrate company experience, with expertise in the area of Assessment Instruments Development - CIPC/CSD Report registration and company profile demonstrating experience of 10 Years and above in Assessment Instrument Development = 10 points - CIPC/CSD Report and company profile demonstrating experience of 8 - 9 Years in Assessment Instrument Development = 7 points - CIPC/CSD Report and company profile demonstrating experience of 6 - 7 Years in Assessment Instrument Development = 5 points - CIPC/CSD Report and company profile demonstrating experience of 3 - 5 Years in Assessment Instrument Development = 3 points - No CIPC/CSD Report and company profile demonstrating experience submitted = 0 points		
2	EXPERIENCE OF TEAM MEMBERS (SMEs)	50
The bidder must provide one detailed CV of the team members clearly demonstrating number of years of knowledge and experience in any of the occupations listed on Annexure 2.2 - Attach a detailed CV clearly demonstrating 10 or more years of knowledge and experience in any of the occupations listed on Table 1 = 40 points - Attach a detailed CV clearly demonstrating 7-8 years of knowledge and experience in any of the occupations listed on Table 1 = 30 points - Attach a detailed CV clearly demonstrating 5-6 years of knowledge and experience in any of the occupations listed on Table 1 = 20 points - Attach a detailed CV demonstrating less than 3 years of knowledge and experience in any of the occupations listed on Table 1 = 0 points		
3	QUALIFICATIONS OF TEAM MEMBERS	40
The bidder must provide qualifications or equivalent to the occupations listed on Table 1 for the team members - Exact qualifications matching with the experience/knowledge as per the CV = 40 points - Equivalent qualification related to the experience/knowledge as per the CV = 20 points - Irrelevant qualification provided with no match to the experience/knowledge as per the CV = 10 points		
TOTAL		100

NB: Bidders who obtain less than the minimum threshold of 70 points will be declared non-responsive and therefore will not be eligible for evaluation of Specific Goals & Price Preference.

9.3. PRICE AND SPECIFIC GOAL EVALUATION (Phase 3)

9.3.1. The estimated total contract value for this procurement is below R50,000,000 (inclusive of VAT). Accordingly, this Request for Quotation (RFQ) process is conducted in line with the applicable Supply Chain Management (SCM) policies of INSETA and the thresholds prescribed by National Treasury. The 80/20 preference point system, as prescribed by the Preferential Procurement Policy Framework Act (PPPFA) Regulations, 2022, will therefore apply.

9.3.2. 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:

$$Ps = 80 \{1 - \frac{(Pt - Pmin)}{Pmin}\}$$

P min

Where:

Ps = Points scored for comparative price of bid under Consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of the lowest acceptable bid

- a) A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender.
- b) 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.
- c) Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points unless objective criteria justify the award to another bidder.
- d) Preference points shall be calculated after the process has been brought to a comparative basis, taking into account all factors of non-firm prices.
- e) 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.
- f) 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.
- g) Should two or more bids be equal in all respects, the award shall be decided by the drawing of lots.

9.3.3. Specific goals points will be awarded as follows:

- a) Table 1: Specific goals for this RFQ process and points to be claimed are indicated as per the table below.
- b) *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% 0 points for 50% or less	(Maximum points = 6 points)
Women Ownership 6 points for 75% - 100% 3 points for 51% - 74% 1 point for 1% - 51% 0 points for 0%	(Maximum points = 6 points)
Youth Ownership 5 points for 75% - 100% 3 points for 51% - 74% 1 point for 1% - 50% 0 points for below 50%	(Maximum points = 5 points)
Company owned by People living with disabilities 3 points for ownership by people living with disabilities 0 points for no ownership by people living with disabilities	(Maximum points = 3 points)
Total	20

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

9.3.4. 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.

9.3.5. The organ of state reserves the right to require 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.

- 9.3.6.** 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.
- 9.3.7.** 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.
- 9.3.8.** Bidders who qualify as EME and QSE in terms of the B-BBEE Act must submit a Sworn affidavit. Misrepresentation of information constitutes a criminal offence.
- 9.3.9.** 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.
- 9.3.10.** Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialised scorecard contained in the B-BBEE Codes of Good Practice.

10. PRICING SCHEDULE

- 10.1.** The service provider must provide a price quotation as per the below (***quotation on the service provider's letterhead must be submitted***)- ***Rates quoted must be fixed for a period of the contract.***
- 10.2.** The total cost (*to be used for evaluation*) must include VAT and should be quoted in South African currency (i.e., Rands), the quotation must cover the following;
- **Occupational Qualification**
 - **Quantity**
 - **Quotation (Incl. Developer & Moderator Report)**
 - **Total (VAT. Inc)**

11. CONTRACT DURATION

- 11.1.** The contract will be a one-off period.

12. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 12.1.** 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, or a Purchase order has been issued.

13. WORKMEN AND SUPERVISION ON SITE

- 13.1.** The service provider shall be held responsible for the conduct of its employees and the conduct of

14. CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 14.1.** The successful bidder will be required to enter into a Service Level Agreement (SLA) with measurable Key Performance Indicators (KPIs), performance targets, reporting frequencies and consequences for non-performance.
- 14.2.** The successful bidder may be required to have adequate professional indemnity as well as liability insurance in place (upon parties contracting).
- 14.3.** The successful bidder will be required to sign a non-disclosure agreement for the duration of the contract period.
- 14.4.** 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.
- 14.5.** Bidders are required to 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.
- 14.6.** Bidder will be subjected to periodic review in terms of measuring satisfactory performance until contract is completed and shall invoke applicable penalties as per contract terms and conditions, where there is unsatisfactory performance.
- 14.7. Delivery address, INSETA Offices: 18 Fricker Road, Illovo, Sandton, 2196.**

15. Bid requirements when bidding as the following:

15.1. Consortium

- 15.1.1.** 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.
- 15.1.2.** 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.
- 15.1.3.** 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:

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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 intents and purposes fulfils the requirements of the bid through a combination of skills)

b) Partner

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

15.1.4. 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 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.

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

15.2. A joint venture

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

15.3. Unincorporated joint venture:

15.3.1. 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

- 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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15.4. Incorporated joint venture

15.4.1. 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.

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

- 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.

16. COMMUNICATION

16.1. 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 the BID process, between the closing date and the date of the award of the business.

16.2. All enquiries relating to this BID should be emailed **three days before the closing date.**

17. CONDITIONS TO BE OBSERVED WHEN BIDDING

17.1. The organisation 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 their BID submission. The organisation also reserves the right to withdraw or cancel the BID at any stage.

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

17.3. The competitive shall remain open for acceptance by the Organisation for a period of **90 days** from the closing date of the RFQ Enquiry.

INSETA reserves the right to:

17.4. Do not evaluate and award a bid that does not comply strictly with this BID document.

17.5. Make a selection solely on the information received in the Bid Document and enter into negotiations with any one or more of the preferred bidder(s) based on the criteria specified in the terms of reference.

17.6. 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.

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

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

18. COST OF BIDDING

- 18.1.** The bidder shall bear all costs and expenses associated with the 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.

19. ANONYMOUSLY REPORTING OF FRAUD

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

20. NOTE TO BIDDERS

- 20.1.** Due diligence to be conducted by INSETA prior to the award of the contract, where applicable.

END OF DOCUMENT