

RFQ	RFQ/INS/2026/2027/0050
RFQ DESCRIPTION	APPOINTMENT OF PROFESSIONAL SERVICE PROVIDER TO SUPPORT THE INSETA WITH PUBLIC RELATIONS SERVICES UTILISING STRATEGIC COMMUNICATION, COMMUNICATION TOOLS AND VARIOUS ENGAGEMENT PLATFORMS, TO PLAN AND OVERSEE PUBLIC RELATIONS ACTIVITIES ENSURING EFFECTIVE COMMUNICATION WITH ALL INSETA STAKEHOLDERS
RFQ ISSUE DATE	29th September 2026
BRIEFING SESSION	N/A
CLOSING DATE & TIME	2nd October 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 email address mentioned above.
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), established in March 2000, is a public entity listed in Schedule 3a of the PFMA. 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. LEGISLATIVE AND REGULATORY FRAMEWORK

- 2.1** 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 (PPPFA) with its latest 2022 regulations.

3. PURPOSE

- 3.1** The main objective of the project is to appoint a service provider to assist INSETA to render communication, marketing, and public relations services to support INSETA's information dissemination and stakeholder engagement initiatives for a period of 6 months.
- 3.2** The appointed service provider is coming on board as a strategic communication, marketing, and public relations partner to assist the INSETA with the following activities as and when required:
- 3.2.1** To communicate the activities aligned to the vision and mission of the INSETA informing, educating, and promoting the INSETA to the public and ensure brand reputation is maintained.
 - 3.2.2** To create various platforms and ensure INSETA stakeholder-related engagements have a reach to the intended audiences.
 - 3.2.3** To showcase what the INSETA does, ensuring people understand the SETA's role in the insurance industry and in building a skills pipeline to help transform the sector.
 - 3.2.4** To promote transformation within the sector through appropriate marketing and communication initiatives aimed at changing perceptions and behaviour where necessary.
 - 3.2.5** To provide thought-leader content to promote INSETA's mandate and educate stakeholders on current trends in the sector.
 - 3.2.6** To communicate on relevant platforms, and especially to maximise the potential of the digital market creating awareness of the INSETA's mandate for brand

positioning in order to build relations with key stakeholders through national campaigns and various communication channels.

4. SCOPE OF WORK

- 4.1 INSETA requires services of an established public relations agency in the following platforms not limited to:

Public Relations (Brand Management, Reputational Management and Strategic Communication services)

- 4.2 The goal is to ensure mutually beneficial two-way communication with external and internal stakeholders about any matter deemed critical by INSETA and deserving to being communicated at that time, to enhance brand and reputation management of the SETA.
- 4.3 It is anticipated that the outcome from this effort will enhance stakeholder satisfaction.
- 4.4 The focus of the consultant/service provider work will be on strategic communication planning, public relations and support on emergent communications issues as needed.
- 4.5 The consultant/service provider will work through a single point of contact, being the INSETA CEO or their designee. A sample scope of work is provided, however, a final scope of work will be determined with the selected consultant/service provider.
- 4.6 The INSETA seeks to appoint a suitable, capable, and competent service provider ideally located **in the Gauteng province** with a national footprint able to operate in all 9 provinces. The appointed service provider will assist the INSETA as and when required to deliver a wide spectrum of communication, marketing, and public relations services in support of the objectives outlined in section 2 above.
- 4.7 The INSETA has a fully functioning Stakeholder Marketing and Communication unit with the following objectives:
- 4.7.1 Communicating the activities of INSETA and aligning them to the vision and mission of the Organization.
 - 4.7.2 Creating various platforms and ensuring INSETA stakeholder-related engagements have a reach to the intended audiences
 - 4.7.3 Showcasing and demonstrating the success of the INSETA by ensuring people understand the SETA's national role
 - 4.7.4 Promoting transformation within the sector and advocate for economic transformation programmes
 - 4.7.5 Promoting the Insurance sector skills development strategy
 - 4.7.6 Providing thought-leader content to drive policy and other issues
 - 4.7.7 The appointed service provider will be coming on board to assist this unit, as

and when required and when capacity constraints presents itself.

4.7.8 The appointed service provide will be responsible for assisting thw INSETA on the following areas;

4.8 Public Relations Management

4.8.1 A proposed project plan is required for the first part of the proposal. The second part of the proposal must include a strategic communication and intervention proposal such as media relations, media plan, liaising, brand innovation awareness & awareness campaigns, digital media, stakeholder engagement, internal and external communication and intergovernmental communication.

4.8.2 The successful Public Relations OR Reputation Management Agency will be expected to perform the following responsibilities:

4.8.3 To enhance our brand visibility and marketing effectiveness.

4.8.4 This should detail the objectives, processes, and considerations for selecting stakeholder engagement platforms that align with INSETA's target audience and marketing goals with the aim of:

- Define and Redefine brand strategy and positioning
- Align INSETA's mandate with a compelling public facing story (skills development, transformation and industry impact)
- Development of comprehensive a public relations strategy aligned with INSETA goals
- Reputation Assessment, Restoration and Maintenance
- Evaluate current perception among stakeholders (internal & external).
- Conduct Stakeholder Perception Surveys
- Continuous gathering of feedback from industry partners, learners, regulators, and staff.
- Identify reputation vulnerabilities (governance, service delivery, transformation issues).
- Utilization of various media and communication platforms for outreach
- Planning and overseeing public relations activities and campaigns
- Effective stakeholder engagement and communication management
- Monitoring and evaluation of communication effectiveness
- Provision of regular reports and updates on public relations activities
- Utilizing data-driven insights to select media that effectively engage our target demographics.

- Maximizing the return on investment (ROI) by negotiating favorable rates and terms for additional services that could assist in enhancing brand awareness and management initiatives
- Implement metrics to assess the effectiveness of media placements.
- Public Relations services

4.9 Strategic Communication /Brand Awareness Publications

4.9.1 The Agency will assist in the creation of awareness of the INSETA's mandate for brand positioning to build relations with key stakeholders through marketing and various communication channels such as:

4.9.2 Assist in the design, layout and editing of documents for online publishing. Examples of such documents required from time to time include:

- Meda Sentiment Analysis
- INSETA's Newsletter (Frequency: Quarterly)
- Web-based newsletter with clickable links
- Create content as per client brief
- INSETA Articles (Frequency: As and when published)

4.10 Advisory services

4.10.1 Executive Communication Coaching (Prepare Board Chairperson, CEO, and Executives for presentations, speeches, and media appearances)

4.10.2 Messaging Frameworks (Develop consistent talking points aligned to INSETA strategy.

4.10.3 Thought Leadership Strategy (Position Executives as leaders in skills development and insurance sector innovation.

4.10.4 Internal Communication Strategy (Ensure alignment and engagement across employees and stakeholders)

5. CONFIDENTIALITY AND COPYRIGHT

5.1 All information, documents, programmes and reports must be regarded as confidential and property of the INSETA and may not be made available to any unauthorised person or institution without the written consent of the Chief Executive Officer or her delegates. At the end of the contract period or termination of the contract, all information, artwork and other materials produced for the INSETA (customers' personal information, transactional information and other relevant information) will become the property of INSETA.

6. USE OF REASONABLE SKILL AND CARE

The appointed service provider must demonstrate the following care and skills:

- a) Impartiality
- b) Confidentiality
- c) Objectivity
- d) Highest standard of integrity
- e) Listening skills
- f) Writing/drafting skills
- g) Interpretation skills

6.1 Competency and knowledge, skills and abilities required:

- 6.1.1** Preference will be given to professionals/companies that will be able to demonstrate prior experience of similar projects done(public relations, brand and reputation management)
- 6.1.2** A minimum of 8-10 years' experience of dealing with brand management and stakeholders, with a team lead holding at least an NQF 7 Qualification in Public Relations/Strategic Communication or Public Management.
- 6.1.3** Registration with PRISA (Team Lead or the Consultancy Firm)
- 6.1.4** Proof of experience should be submitted with responses to the bid invitation.
- 6.1.5** Ability to management brands, enhance brand visibility using multi-media and other communication tools.
- 6.1.6** Ability to create and disseminate positive brand messaging as part of increasing stakeholder buy-in and public perceptions
- 6.1.7** Have the capacity and resources adequate to complete assignment within set timelines
- 6.1.8** Provide traceable references of the similar experience of conducting public relations, reputation management and strategic brand management for a Schedule 3A entity or any similar organ of state with recommendation letters demonstrating the work done, project period and the value .

7. EVALUATION CRITERIA

7.1 LEGISLATIVE REQUIREMENTS (Phase 1)

- 7.1.1 Bidder(s) must submit:
- 7.1.2 Completed and Signed RFQ Form Document
- 7.1.3 **Quotation on the bidder's letterhead**
- 7.1.4 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.

7.1.1.1 Completed and Signed Standard Bidding Document (**SBD 6.1**) Preference Points Claim form.

7.1.1.2 Bidder must provide a valid **BBBEE Certificate or Sworn Affidavit**.

7.1.1.3 Central Supplier Database (**CSD**) Report.

Failure to comply with the requirement above within 7 working days after being informed will lead to invalidation of your proposal.

7.2 MANDATORY REQUIREMENTS (Phase 2)

The bidder must submit the following:

- CV and Qualifications for the **project leader**.
- Company experience (**Company profile**)
- Methodology and approach
- Registration with the Public Relations Institute of South Africa
- Price quotation on company letter head (**Rate per hour**)

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



7.3 PRICE AND SPECIFIC GOAL EVALUATION (Phase 3)

7.3.1 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 the National Treasury. The 80/20 preference point system, as prescribed by the Preferential Procurement Policy Framework Act (PPPFA) Regulations, 2022, will therefore apply.

7.3.2 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:

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

Where:

P_s	=	Points scored for the comparative price of the bid under Consideration
P_t	=	Comparative price of bid under consideration
P_{min}	=	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.

7.3.3 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)
A 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).

- 7.3.4** 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.
- 7.3.5** 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 regarding preferences, in any manner required by the organ of state.
- 7.3.6** 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.
- 7.3.7** 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 regarding preferences, in any manner required by the organ of state.
- 7.3.8** 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.
- 7.3.9** Bidders other than EMEs 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.
- 7.3.10** 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.

8. PRICING SCHEDULE

- 8.1** The service provider must provide a price quotation as per the below (**quotation on the service provider's letterhead must be submitted**)
- 8.2** The total cost must include VAT and should be quoted in South African currency (i.e., Rands).
- 8.3** Costing (inclusive of all claims and disbursements) Item Description

Description	Qualifications	Rate per hour (Inclusive of VAT)
Project Leader	Degree in Public Relations/Strategic Communications or Public Management (Valid PRISA registration)	

9. CONTRACT DURATION

- 9.1** The contract will be for a period of 06 months. The service is required to commence immediately.

10. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 10.1** 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.

11. WORKMEN AND SUPERVISION ON SITE

- 11.1** The service provider shall be held responsible for the conduct of its employees and the conduct of its subcontractors' employees for the full duration of the contract.

12. CONTRACTUAL OBLIGATION

The bidder will be required to comply with the following:

- 12.1** 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.
- 12.2** The successful bidder may be required to have adequate professional indemnity as well as liability insurance in place (upon parties contracting).
- 12.3** The successful bidder will be required to sign a non-disclosure agreement for the duration of the contract period.
- 12.4** 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.
- 12.5** Bidders are required to fully comply with the relevant SCM Legislative Framework as well as the 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 4 of 2014.
- 12.6** Bidder will be subjected to periodic review in terms of measuring satisfactory performance until the contract is completed and shall invoke applicable penalties as per contract terms and conditions, where there is unsatisfactory performance.
- 12.7** **Delivery address, INSETA Offices: 18 Fricker Road, Illovo, Sandton, 2196.**

13. RFQ requirements are as follows:

13.1 Consortium

- 13.1.1** A consortium is an association of two or more individuals, companies, organisations, or governments (or any combination of these entities) to participate in a common activity or pool their resources for achieving a common goal.
- 13.1.2** A consortium requires that each participant retain 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 delineates the rights and obligations of each member.

13.1.3 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 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

13.1.4 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 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.

13.1.5 Of importance is that in a consortium, each individual team members retain their identity.

13.2 A joint venture

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

13.4 Unincorporated joint venture:

13.4.1 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.

13.5 Incorporated joint venture

13.5.1 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 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.

14 COMMUNICATION

14.1 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.

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

15. CONDITIONS TO BE OBSERVED WHEN BIDDING

15.1 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.

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

15.3 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:

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

Make a selection solely on the information received in the Bid Document and enter into negotiations.

15.5 with any one or more of the preferred bidder(s) based on the criteria specified in the terms of reference.

15.6 Contact any bidder during the evaluation process 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.



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

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

15.8 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 based on the lowest costs.

16 COST OF BIDDING

16.1 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.

17 ANONYMOUSLY REPORTING OF FRAUD

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

18 NOTE TO BIDDERS

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

END OF DOCUMENT