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BID NUMBER: TENDER-INS/2025/26/008

BID DESCRIPTION – PROCUREMENT OF SYSTEMS SUPPORT POOL OF CONTRACTORS FOR CURRENT INSETA SYSTEMS FOR A PERIOD OF 3 YEARS.

Tender documents are obtainable from **12 January 2026** from the following websites:

- **ETender Portal**
- **INSETA Website**

Closing Date: 03 February 2026 at 11:00 am

Delivery: INSETA Office, 18 Fricker Road, Illovo, Sandton.

For enquiries contact the INSETA Supply Chain Management at bids@inseta.org.za

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TERMS OF REFERENCE

PROCUREMENT OF SYSTEMS SUPPORT POOL OF CONTRACTORS FOR CURRENT INSETA SYSTEMS FOR A PERIOD OF 3 YEARS.

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 to 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 The INSETA seeks to establish a pool of pre-qualified and competent systems support contractors to provide professional ICT systems development, and enhancement services for its core business applications and platforms.
- 1.3 The systems currently in use include Sage 300 ERP, Sage 300 People, Microsoft Products (Azure, SharePoint, Microsoft 365, and Data Management environments), and Odoo ERP. The aim of this procurement is to ensure continuous systems improvement, sustainability, efficiency, integration, interoperability and compliance with best practices in information systems management. The selected contractors will form part of a resource pool to be engaged on a need basis to perform specific assignments and projects across the mentioned systems.

2. SITUATION ANALYSIS

- 2.1 The INSETA ICT environment comprises multiple integrated enterprise systems that support finance, human resources, payroll, document management, data analytics, and enterprise collaboration functions. Currently, several systems require enhancements, upgrades, and optimization to improve operational efficiency and user experience.
- 2.2 System integrations and automation between Sage, Microsoft platforms, and Odoo require strengthening to ensure seamless data flow. There is a need for continuous technical support and specialized system expertise to maintain uptime, security, and scalability of these systems. To ensure compliance with ICT standards, the organization must partner with certified and experienced service providers who can deliver according to best practices in systems implementation, software development lifecycle (SDLC), and project management methodologies such as PMBOK or PRINCE2.

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3. SCOPE OF WORK

3.1. The appointed service providers will be required to deliver professional ICT system development services across the following key systems and technologies:

3.1.1. General Responsibilities

- 3.1.1.1. Provide system maintenance, and troubleshooting.
- 3.1.1.2. Perform system analysis, enhancement, and customization.
- 3.1.1.3. Conduct system upgrades, patch management, and performance optimization.
- 3.1.1.4. Develop new functionalities and integrations following the SDLC model.
- 3.1.1.5. Implement testing, user acceptance, and change management procedures.
- 3.1.1.6. Provide training and knowledge transfer to internal ICT staff.
- 3.1.1.7. Ensure data integrity, security, and compliance with ICT governance standards.
- 3.1.1.8. Produce detailed documentation, reports, and deliverables.

3.1.2. System-Specific Activities

- 3.1.2.1. **Microsoft Products** (Azure, SharePoint, Microsoft 365, Data Management)
 - a) Configure, maintain, and optimize Microsoft environments.
 - b) Improvements SharePoint document management and workflows.
 - c) Develop a Data Lake using Microsoft Azure cloud services and data analytics.

3.1.2.2. **Odoo ERP**

- a) Develop and support Odoo MIS modules
- b) Customize workflows and integrations with other systems.

3.1.3. Project Management and Delivery

- 3.1.3.1. All projects and activities must follow a formal SDLC process and recognized project management methodologies (Agile, PRINCE2, PMBOK). Each task must include a project plan, resource allocation, and defined deliverables.

4. GUIDELINE FOR POOL UTILIZATION

- 4.1. The pool will be comprised of the top 3 bidders post the scoring process (except for lawful pass-over).
- 4.2. The allocation/briefing/contracting of service providers for a specific work assignment will be facilitated by the Supply Chain Management (SCM).
- 4.3. Work will be allocated on a **competitive basis** amongst the Service Providers on the Pool.
- 4.4. Service Providers on the pool are not guaranteed any specific work assignments during the tenure of this contract.

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5. TIMEFRAMES

- 5.1. The contract duration will be for a period of three (3) years.

6. CONTRACTUAL OBLIGATION

- 6.1. Bidders to fully complete SBD 3.1 including all applicable costs including VAT, with a fixed rate price for the duration of the contract.
- 6.2. 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.
- 6.3. The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (upon parties contracting).
- 6.4. 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 4 of 2014.
- 6.5. The successful bidder will be required to sign a non-disclosure agreement for the duration of the contract period.
- 6.6. **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.**

7. UNSATISFACTORY PERFORMANCE

- 7.1. In the event that the Service Provider fails to meet the performance standards outlined in this ToR or SLA, INSETA shall where applicable raise remedies, terminate the contract, seek damages or raise penalties such as impose financial penalties to the Service Provider.
- 7.2. The following shall be considered examples of unsatisfactory performance:
 - 7.2.1. Failure to meet the agreed-upon deadlines.
 - 7.2.2. Failure to deliver goods or services that meet the agreed-upon standards.
 - 7.2.3. Failure to respond to client inquiries or issues in a timely manner.
 - 7.2.4. Failure to maintain confidentiality or security of client information.
 - 7.2.5. Gross negligence by the service provider or its employees.

8. ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 8.1. 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.
- 8.2. The Contract site is at INSETA (as and when required).

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9. WORKMEN AND SUPERVISION ON SITE

- 9.1. 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.

10. EVALUATION CRITERIA

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

10.2. The evaluation criteria will be based on the following phases/requirements:

- Phase 0: Administrative requirements
- Phase 1: Mandatory requirements
- Phase 2: Technical Functionality (100 points) – The threshold of 70 points
- Phase 3: Evaluation on Price and Specific Goals

11. ADMINISTRATIVE REQUIREMENTS (Phase 0)

- 11.1. Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 11.2. Bidder must complete, sign and submit a Standard Bidding Document (SBD 1) Procurement Invitation.
- 11.3. Standard Bidding Document (SBD 3.1) Pricing Schedule – Annexure A (in a separate envelope).
- 11.4. Standard Bidding Document (SBD 4) Bidder's Disclosure.
- 11.5. Standard Bidding Document (SBD 6.1) Preference Points Claim form.
- 11.6. Initialled General Conditions of Contract (GCC).
- 11.7. Bidder must provide BBBEE Certificate or Sworn Affidavit (as prescribed or CIPC or DTI template).

12. MANDATORY REQUIREMENTS (Phase 1)

- 12.1. Service providers must meet the following requirements:
 - 12.1.1. Must be certified partners or accredited resellers/developers for Microsoft, and Odoo. Valid OEM partnership or certification documents must be submitted.

13. FUNCTIONAL EVALUATION CRITERIA (Phase 2)

- 13.1. The tender submission will be functionally evaluated out of a **minimum of 100 points for the paper-based evaluation** – any bidder who scores less than minimum 70 points will not be considered for further evaluation on Price and Specific Goals – Phase 3.

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DESCRIPTION	WEIGHT
Experience and References	40
<p>Bidders must submit a minimum of five (5) signed, dated, and contactable reference letters. Reference letters must be on client's letterhead for work done within the past seven (7) years. At least one (1) reference letter must be provided for each of the following requirements, demonstrating that the bidder has successfully implemented:</p> <ul style="list-style-type: none">a) A solution developed using the Odoo framework.b) Customised Odoo workflows and integrations with other ERP systems.c) A Data Lake and dashboards for data analytics on Microsoft cloud services.d) Developed automated solutions on SharePoint Online.e) Configured, maintained, and optimized environments within Microsoft cloud services.	
<p>NB: THE ABOVE MUST BE CLEARLY OUTLINED ON THE REFERENCE LETTERS</p> <ul style="list-style-type: none">a) Five (5) letters each addressing the requirements listed above = 40 pointsb) Three (3) to four (4) letters addressing any 3 or 4 the requirements listed above = 25 pointsc) Two (2) letters addressing any 2 the requirements listed above = 10 points	
Non-compliance with the above requirements = 0 points	
Technical Expertise and Staff Qualifications	50
<p>Bidders must provide a list of technical staff and ensure that all submitted CVs correspond to the actual individuals who will implement the project throughout its lifespan. CVs must not originate from the same individual.</p> <p>Each CV must demonstrate distinct and relevant areas of expertise aligned to the scope of work, covering the following roles:</p> <ul style="list-style-type: none">a) Developerb) Project Managerc) Change Managerd) Business Analyste) Data Engineer <p>Each CV must clearly outline the individual's role, certifications, and a minimum of five (5) years' experience relevant to the scope of work. Please use the table below to complete the full names of the technical staff:</p>	

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MICROSOFT SERVICES STAFF		ODOO SERVICES	
Designation	Full Names	Designation	Full Names
Developer		Developer	
Project Manager		Project Manager	
Business Analyst		Business Analyst	
Change Manager		Change Manager	
Data Engineer		Data Engineer	

NB: CVS SUBMITTED MUST NOT BE FROM THE SAME INDIVIDUALS

CVs of Technical Staff for Microsoft Services = 15 Points

Developer

- Minimum of 5 years' experience (SharePoint developer, SharePoint Workflow Manager • Visual Studio, Microsoft 365 Office 365, SharePoint online, SharePoint PowerShell scripting and Power Platform) = **2 points**
- Proof of National Diploma in Software Development/Computer Science/Certified Software Development Professional Certification = **1 points**

Project Manager

- Minimum of 5 years' experience (in managing, planning, executing, and delivering projects related to Microsoft technologies, Microsoft 365, Azure Cloud, SharePoint, Power Platform, and related solutions) = **2 points**
- Proof of National Diploma in Project Management/ Certified Project Manager Certificate = **1 points**

Change Manager

- Minimum of 5 years' experience = **2 points**
- Proof of Change Management Certification = **1 points**

Business Analyst

- Minimum of 5 years' experience (in analysing business needs, identifying opportunities for improvement, and translating requirements into functional specifications for Microsoft-based solutions such as Microsoft 365, SharePoint, Power Platform, Azure services, and related Microsoft technologies.) = **2 points**

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- Proof of National Diploma in Business Analysis/Computer Science/National Certificate in Business Analysis = **1 points**

Data Engineer

- Minimum of 5 years' experience (in designing, developing, and maintaining robust data pipelines, data lakes and architectures that support analytics, reporting, integration across Microsoft-based system and other products) = **2.5 Points**
- Proof of Certified Data Engineer Certificate (**Microsoft Certified: Azure Data Engineer Associate**) = **2.5 points**

CVs of Technical Staff for Odoo Services = 35 Points

Developer

- Minimum of 5 years' experience (in XML, Python, PostgreSQL, Odoo.SH, Linux, GitHub and related technologies) = **5 points**
- Proof of Odoo Certified Development /Python Certified Developer/ National Diploma in Software Development/Computer Science = **2 points**

Project Manager

- Minimum of 5 years' experience (with experience managing Odoo implementation Projects) = **5 Points**
- Proof of National Diploma in Project Management/ Certified Project Manager Certificate = **2 points**

Change Manager

- Minimum of 5 years' experience (with experience bringing gap between technology, business processes, people, primarily ensuring the adoption of Odoo framework and its intended business value by managing the human and operational aspects of the transition. = **5 points**
- Proof of Change Management Certification = **2 points**

Business Analyst

- Minimum of 5 years' experience (with experience in analyzing, designing, and optimizing business processes using the Odoo ecosystem and delivering maximum value, aligned with business goals.= **5 Points**
- Proof of National Diploma in Business Analysis/Computer Science/National Certificate in Business Analysis = **2 points**

Data Engineer

- Minimum of 5 years' experience (with experience in designing, building, and maintaining the data pipelines that extract data from the Odoo database (and related sources), transform it into a clean, analysable format, and load it into a centralized data warehouse (e.g., PostgreSQL data warehouse, Big Query, Snowflake). = **5 points**
- Proof of Certified Data Engineer Certificate = **2 points**

Non-compliance with any of the above requirements = 0 points

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Project Approach and Methodology	10
Bidders must provide a Company Profile with a detailed project plan and Risk Management Plan outlining the following: :	
<p>a) Company Profile (1 Point)</p> <p>b) Project Plan (6 Points)</p> <ul style="list-style-type: none">1. Project Understanding & Objectives2. Proposed Methodology3. Detailed Work Breakdown Structure (WBS)4. Visual Project Timeline / Gantt Chart5. Resource Allocation Plan6. Quality Assurance & Control Plan7. Client Communication <p>c) Risk Management Plan - Detailed Risk Register Table outlining the following: (3 Points)</p> <ul style="list-style-type: none">1. Risk Descriptions2. Probability & Impact Ratings3. Mitigation Strategies4. Contingency Plans	100

Non-compliance with the above requirements = 0 points

TOTAL

100

13.2. Bidders are required to pass the minimum threshold of **70 points** on the functional criteria to be considered for the next phase of evaluation which is **Phase 3 – Price and Specific goals**.

13.3. Bidders who score less than **70 points** will not be considered for the next phase, thus will be disqualified, and will be declared non-responsive.

14. Price and Specific Points Evaluation (Phase 3)

14.1. Preference Points Applied Against Specific Goals

The tender responses will be evaluated on the **80/20 preference point system for acquisition of goods or services with Rand value equal to or below R50 million**.

14.1.1. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

14.1.2. Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- a) Price; and
- b) Specific Goals.

The maximum points for this tender are allocated as follows:

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	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

15. POINTS AWARDED FOR PRICE AND PREFERENCE POINTS

(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
 P_{\min} = 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 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.

16. SPECIFIC GOALS PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

16.1. Table 1: Specific goals for the bid process and points claimed are indicated per the table below.

16.2. *The 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 <ul style="list-style-type: none"> • 6 points for 100% black owned • 3 points for 75-99% black owned • 1 point for 51-74% black owned 	(Maximum points = 6 points)

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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.

- 16.3. 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.
- 16.4. 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.

17. Bid Procedure Conditions:

17.1. Counter Conditions:

The INSETA draws the bidders' attention that amendments to any of the Bid Conditions or setting of counter conditions by bidders will result in the invalidation of such bids.

17.1.1. Award Criteria: Due Diligence Process

- 17.1.1.1. INSETA reserves the right to conduct due diligence/screen on the bidder prior to the award of a contract.
- 17.1.1.2. The due diligence/screening will be conducted based on the reference letters received from the bidder to confirm the services rendered and the standard of the bidder's performance.
- 17.1.1.3. Should such due diligence/ screening results have a negative outcome, the INSETA reserves the right not to award the bid to the subjected/recommended/highest scoring bidder.
- 17.1.1.4. The INSETA reserve a right not to award a bid to the highest scoring bidder but to award to a service provider who meet the requirement fully.
- 17.1.1.5. The due diligence method will be determined by the INSETA.
- 17.1.1.6. Non-contactable referees will lead to the failure of the due diligence process and will result in a negative outcome for the bidder.

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18. Bid requirements when bidding as the following:

18.1. Consortium

- 18.1.1. 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.
- 18.1.2. 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.
- 18.1.3. 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 the 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 intent and purpose fulfils the requirements of the bid through combination of skills)

b) Partner

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

- 18.1.4. 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 BBBEE status level 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.
- 18.1.5. Of importance is that in a consortium, each individual team members retain their identities.

18.2. A joint venture

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

18.3. Unincorporated joint venture:

- 18.3.1. 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

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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 B-BBEE Certificate.

18.4. Incorporated joint venture:

18.4.1. This aligned to a registered entity or company. A registered entity/ company with a consolidated B-BBEE 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

- 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 B-BBEE Certificate.

19. COMMUNICATION

19.1. 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.***

20. CONDITIONS TO BE OBSERVED WHEN BIDDING

20.1. 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. 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 **120 days** from the closing date of the BID Enquiry.

INSETA reserves the right to:

20.2. Not evaluate and award a bid that do not comply strictly with this BID document.
20.3. 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

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terms of reference.

- 20.1. 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.
- 20.2. Cancel this BID at any time as prescribed in the PPPFA.
- 20.3. Should bidder(s) be selected for further negotiations, they will be chosen on the basis of the cost effectiveness and the principle of value for money not necessarily on the basis of the lowest costs.

21. ANONYMOUSLY REPORTING OF FRAUD

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

22. COST OF BIDDING

- 22.1. 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