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BID NUMBER: TENDER-INS/2025/26/006

BID DESCRIPTION – APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF ICT LICENSES AND SUBSCRIPTIONS TO INSETA FOR A PERIOD OF THREE (3) YEARS.

Tender documents are obtainable from **05 November 2025** from the following websites:

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

Closing Date: 26 November 2025 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

TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF ICT LICENSES AND SUBSCRIPTIONS TO INSETA FOR A PERIOD OF THREE (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 objective of this request is to appoint an experienced service provider for the Provision of ICT Licenses and Subscriptions for a period of three (3) years for INSETA.

2 SITUATION ANALYSIS

- 2.1 The INSETA current ICT licenses infrastructure is as follows:

2.1.1 **Microsoft Licenses & Subscriptions**

- 2.1.1.1 MS 365 A5 - Quantity 150
- 2.1.1.2 MS 365 Visio Professional – 10
- 2.1.1.3 MS 365 Project Professional – 10
- 2.1.1.4 MS Teams Rooms Pro – 8
- 2.1.1.5 MS Windows Server Standard - 3

2.1.2 **Mimecast Email Security**

- 2.1.2.1 Mimecast M2A – 130
- 2.1.2.2 INSETA has valid contract ending 30 July 2026.

2.1.3 **Tableau Creator**

- 2.1.3.1 Tableau creator - Desktop & Prep license – 5
- 2.1.3.2 Tableau creator – Server – 1
- 2.1.3.3 INSETA has valid contract ending 30 March 2026

2.1.4 **CIBECS Endpoint Protection Cloud**

- 2.1.4.1 Cibecs endpoint cloud – 150
- 2.1.4.2 Cibecs Cloud to Cloud Backups – 150
- 2.1.4.3 INSETA has valid contract ending 31 March 2026.

2.1.5 **Fortinet Subscriptions**

- 2.1.5.1 360 Protection bundle or Equivalent – that covers 130 endpoints
- 2.1.5.2 Forticlient EMS – 150
- 2.1.5.3 INSETA has valid contract ending 19 April 2026.

2.1.6 **Githb Subscription**

- 2.1.6.1 Team Plan (Advanced collaboration & support) – 3
- 2.1.6.2 Monthly subscription

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2.1.7 Odoo SH

2.1.7.1 Odoo Enterprise Licenses - 1 X Odoo Enterprise License

2.1.7.2 Odoo SH (PaaS + IaaS: The full stack platform)

(a) 1 Worker

(b) 200GB Storing

(c) 4 Staging Environments

2.1.7.3 The licence is valid until 31 July 2026

2.1.8 Microsoft Azure Subscriptions

2.1.8.1 Storage

2.1.8.2 Backup

2.1.8.3 Site Recovery

2.1.8.4 Virtual Machines

3 SCOPE OF WORK

3.1 Bidders are required to provide the following as per the list below: (bidders to note situation analysis stated above for compliance purposes and cost-effective pricing proposal):

NO.	DESCRIPTION OF LICENSES & SUBSCRIPTIONS	
3.1.1	Microsoft Licenses & Subscriptions	
	Description	Quantity
	MS 365 A5	150
	MS Visio Plan 2 - MS 365	15
	MS Project Plan 3 - MS 365	15
	MS Teams Room Pro	8
	MS Windows Server Standard	5
	Privacy management	1 (for activation)
3.1.2	Mimecast Email Security	
	Description	Quantity
	Mimecast M2A	150
	LCS - Bronze	1
	Sync & recover for MS 365	150
	Mimecast AT 1 Mime OS	150
3.1.3	Tableau Creator	
	Description	Quantity
	Creator - Desktop & Prep	5
	Creator - Server	1
3.1.4	CIBECS Endpoint Protection Cloud	
	Description	Quantity
	Cibecs endpoint cloud	150
	Cibecs Cloud to Cloud Backups	150
3.1.5	Fortinet Subscriptions	
	Description	Quantity
	2.5.1 Fortigate - Enterprise Protection bundle or Equivalent	1
	2.5.2 FortiClient Cloud	150
3.1.6	Github Subscriptions	
	Description	Quantity
	Team Plan (Advanced collaboration & support)	8

3.1.7 Odoo SH	
Description	Quantity
Odoo Enterprise Licenses	1
Odoo SH (PaaS + IaaS: The full stack platform)	1 - Worker 200GB Storage, 4 Staging Environments

3.1.8 Microsoft Azure Subscriptions:

- 3.1.8.1 Azure Backup for 6 Servers
- 3.1.8.2 Azure Site Recovery for 4 Servers
- 3.1.8.3 Azure DevOps
- 3.1.8.4 Application Gateway
- 3.1.8.5 Azure Key VAULT
- 3.1.8.6 Azure firewall Standard
- 3.1.8.7 6 inclusive of the 4 existing Virtual Machines (Ubuntu and Windows) as follows:
 - a) Standard_D8ds_v5 (Ubuntu OS)
 - b) Standard_DS3_v2 (Ubuntu OS)
 - c) Standard_B1s (Ubuntu OS – Osticket)
 - d) Standard_B2s (Windows Server OS)
 - e) Standard_D16_v3 / D16 v3 with 16 vCPUs and 64 GiB of memory
 - f) Standard_D32 v3 instance with 32 vCPUs and 128.0 GiB of memory

4 TIMEFRAMES

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

5 CONTRACTUAL OBLIGATION

- 5.1 Bidders to fully complete SBD 3.1 including all applicable costs including VAT, with a fixed rate price for the duration of the contract.
- 5.2 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.
- 5.3 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (upon parties contracting).
- 5.4 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.
- 5.5 The successful bidder will be required to sign a non-disclosure agreement for the duration of the contract period.
- 5.6 **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.**

6 UNSATISFACTORY PERFORMANCE

- 6.1 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.
- 6.2 The following shall be considered examples of unsatisfactory performance:
- 6.2.1 Failure to meet the agreed-upon deadlines.
 - 6.2.2 Failure to deliver goods or services that meet the agreed-upon standards.
 - 6.2.3 Failure to respond to client inquiries or issues in a timely manner.
 - 6.2.4 Failure to maintain confidentiality or security of client information.
 - 6.2.5 Gross negligence by the service provider or its employees.

7 ABSENCE OF OBLIGATION & CONFIDENTIALITY

- 7.2 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.
- 7.3 The Contract site is at INSETA (as and when required).

8 WORKMEN AND SUPERVISION ON SITE

- 8.2 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.

9 EVALUATION CRITERIA

- 9.2 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.
- 9.3 **The evaluation criteria will be based on the following phases/requirements:**
- Phase 0: Administrative requirements
 - Phase 1: Technical Functionality (100 points) – The threshold of 70 points
 - Phase 2: Evaluation on Price and Specific Goals

10 ADMINISTRATIVE REQUIREMENTS (Phase 0)

- 10.2 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 10.3 Bidder must complete, sign and submit a Standard Bidding Document (SBD 1) Procurement Invitation.
- 10.4 Standard Bidding Document (SBD 3.1) Pricing Schedule – Annexure A (in a separate envelope).
- 10.5 Standard Bidding Document (SBD 4) Bidder's Disclosure.
- 10.6 Standard Bidding Document (SBD 6.1) Preference Points Claim form.
- 10.7 Initialled General Conditions of Contract (GCC).
- 10.8 Bidder must provide BBBEE Certificate (accredited by SANAS) or Sworn Affidavit (in as prescribed or CIPC or DTI template).

11 FUNCTIONAL EVALUATION CRITERIA (Phase 1)

11.2 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 2.

DESCRIPTION	WEIGHT
<p>Proof of authority to distribute or resell licenses and subscriptions</p> <p>The bidder(s) must submit proof of authority from the OEM to distribute (where applicable) within South Africa (the proof of authority must be a letter from the OEM) or</p> <p>The bidder(s) must provide the evidence (the evidence must be a letter from the distributor giving reseller rights to the reseller) from an authorised distributor to resell within South Africa.</p> <p>NOTE: Bidders must submit letters or certificates for all six products listed below. Failure to do so will result in non-compliance.</p> <p>Distributor or reseller letter must be for the following subscriptions and licenses:</p> <ol style="list-style-type: none"> 1. Microsoft Licenses & Subscriptions 2. Mimecast Email Security 3. Tableau Creator 4. CIBECS Endpoint Protection Cloud 5. FortiGate Subscriptions 6. Microsoft Azure <p>Total applicable points for of the above products and services= 60 points Non-compliance of the above = 0 points</p>	60
<p>Bidder Experience:</p> <p>Bidder must provide a minimum of five (5) signed, dated and contactable reference letters proving same work done for provision of licences. Reference letters must be on client's letterhead, accompanied by an award/appointment letter or a purchase order that align with the reference letter. The reference letters must indicate the nature of licenses (compliant to section 3 of the terms of reference) within the last five (5) years.</p> <p>Note: Reference must be from different clients not all from the same client. Should the submitted reference letters emanate from the same client, the submission will be scored as one submission.</p> <ul style="list-style-type: none"> • five (5) and more reference letters with award/appointment letters or purchase orders = 40 points • Three (3) to four (4) reference letters with award/appointment letters or purchase orders = 25 points • Two (2) reference letter with award/appointment letter or a purchase order = 10 points • Non-compliance with the above requirements = 0 points <p>NB: Due diligence will be conducted against reference letters submitted and work performed for the referees (See section 15.1.1)</p>	40
TOTAL	100

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- 11.3 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 2 – Price and Specific goals**.
- 11.4 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.

12 Price and Specific Points Evaluation (Phase 3)

12.2 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**.

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

12.2.2 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:

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

13 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:

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

P_{\min}

Where:

P_s = Points scored for comparative price of bid under Consideration

P_t = Comparative price of bid under consideration

P_{\min} = Comparative price of lowest acceptable 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.

14 SPECIFIC GOALS PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:

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

14.3 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)
Women Ownership <ul style="list-style-type: none"> 6 points for 75% - 100% 3 points for 51% - 74% 1 point for below 51% 	(Maximum points = 6 points)
Youth Ownership <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 3 points 	(Maximum points = 3 points)
Total	20

Note: 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.

14.4 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.

14.5 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.

15 Bid Procedure Conditions:

15.1 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.

15.1.1 Award Criteria: Due Diligence Process

- 15.1.1.1 INSETA reserves the right to conduct due diligence/screen on the bidder prior to the award of a contract.
- 15.1.1.2 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.
- 15.1.1.3 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.
- 15.1.1.4 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.
- 15.1.1.5 The due diligence method will be determined by the INSETA.
- 15.1.1.6 Non-contactable referees will lead to the failure of the due diligence process and will result in a negative outcome for the bidder.

16 Bid requirements when bidding as the following:

16.1 Consortium

- 16.1.1 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.
- 16.1.2 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.
- 16.1.3 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
- 16.1.4 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

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foregoing ensures compliance from an SCM process perspective that the consortium is in order.

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

16.2 A joint venture

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

16.3 Unincorporated joint venture:

- 16.3.1 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

- 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.

16.4 Incorporated joint venture:

- 16.4.1 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.

17 COMMUNICATION

- 17.1 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.**

18 CONDITIONS TO BE OBSERVED WHEN BIDDING

- 18.1 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

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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:

- 18.2 Not evaluate and award a bid that do not comply strictly with this BID document.
- 18.3 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 terms of reference.
- 18.4 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.
- 18.5 Cancel this BID at any time as prescribed in the PPPFA.
- 18.6 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of theof cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

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 COST OF BIDDING

- 20.1 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