



REQUEST FOR PROPOSAL (RFP)

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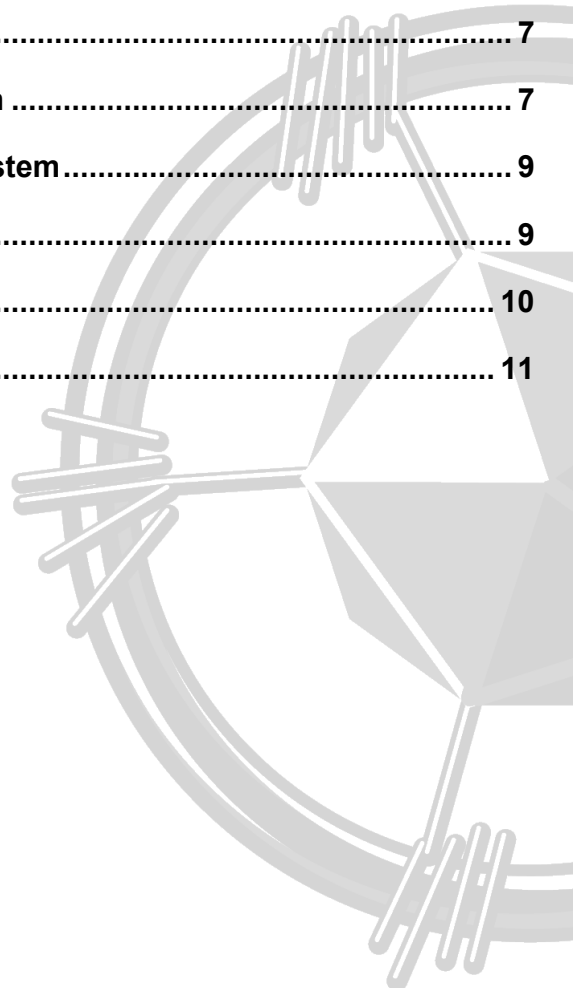
15 October 2025

changes.

*The document shall be revised at least 12 months before next revision date or as per merSETA organisational and operational

Table of Contents

1. Introduction to Request for Proposal (RFP)	3
2. Background Information	Error! Bookmark not defined.
3. Objectives of the Services	3
4. Scope of Work (Service)	3
5. Deliverables	Error! Bookmark not defined.
6. Project Timeline	5
7. RFP Submission	6
8. Late submissions of the RFP	6
9. Request for Proposal (RFP) Rules	6
10. RFP Evaluation Process	6
10.1.1. Evaluation Stage 1: Compliance	7
10.1.2. Evaluation Stage 2: Technical Evaluation	7
10.1.3. Evaluation Stage 3: Preference Point System	9
11. Cost Proposal	9
12. merSETA's RIGHTS	10
13. UNDERTAKINGS BY THE BIDDER	11



1. Introduction to Request for Proposal (RFP)

1.1 The Manufacturing, Engineering and Related Services Sector Education and Training Authority (merSETA) is a Schedule 3A public entity established in terms of the Skills Development Act (Act No. 97 of 1998), Registration Number 17/merSETA/01/04/20, to facilitate skills development for the Metal and Engineering, Motor Retail and Components Manufacturing, Automobile Manufacturing, Plastics Manufacturing, New Tyre Manufacturing Sectors and Automotive Components Manufacturing Chamber. The merSETA is inviting potential service providers to submit the proposal for the services described under scope of work.

1.2 This RFP is subject to the Preferential Procurement Policy Framework Act (Act No. 5 of 2000) and the Preferential Procurement Regulations (2022 Regulations). The General Conditions of Contract (GCC), and, if applicable, any other special conditions of contract. Where, However, the special conditions of the contract conflict with the general conditions of the contract, the special conditions of the contract prevail.

2. Objectives of the Services

The merSETA hereby requests to appoint a suitable, qualified and experienced insurance service provider to provide Asset Insurance Cover for a period of two (2) years, commencing 01 December 2025 and ending 30 November 2027.

3. Scope of Work (Service)

4.1. The assets to be covered will include all fixed and movable assets as per the asset register provided as Annexure A.

4.2 The merSETA operates from seven (7) regional offices, a Head Office, and two (2) satellite offices where assets are located.

4.3 The insurance cover will need to be tailored to the specific operational and risk profile of merSETA and must ensure business continuity in the event of unforeseen losses.

3.4 As per the asset register, the asset base of the merSETA, is as follows:

Category	Net book value
Computer Equipment	R 1 675 103-00
Furniture and fittings	R 4 271 353-00
Office Equipment's	R 711 993-00

4.5 The prospective service provider is expected to address the following risk areas and provide reliable information on the following:

4.5.1 **Business All Risk:** As per merSETA, asset register. These assets comprise, Furniture and Fittings, Computer Equipment and Office Equipment.

4.5.2 **Theft:** Damage to contents, at any building because of theft accompanied by forcible entry into or exit from the building.

4.5.3 **South African Special Risks Insurance Association (SASRIA):** Riot and strike and political riot.

4.5.4 **Newly procured assets:** To provide process to be followed, when new assets are procured and registered on the Fixed Asset Register.

4.6 In addition, the successful service provider will be expected to provide the following services:

4.6.1 **Support:** One –on-one dedicated Claims Consultant.

4.6.2 **Claims:** 30 calendar days turn-around time for outcome of claim from the date of submission of the claim.

4.6.3 **Assessment and Advice:** The service provider shall over the period of the contract be expected to independently assess the merSETA's risk and advice and recommend additional insurance cover for the merSETA.

4.6.4 **History of claims:** Is provided as **Annexure B**

NB: The merSETA, requires a comprehensive asset insurance and must include vehicle jamming in terms of electronic equipment's.

4. Insurance Coverage Requirements

5.1 **Cover must include the following risks:**

- Fire, explosion, and lightning
- Theft, burglary, and malicious damage
- Accidental damage and breakage
- Water, flood, and storm damage

5.2 Coverage for assets both on-site and off-site including when assets are in transit between offices.

5.3 Provision for business interruption or loss of use due to insured events .

5.4. Valuation and Sum Insured

5.4.1. Assist in reviewing and verifying the asset register provided by merSETA to ensure accurate insured values.

5.4.2. Ensure coverage is based on replacement value or current market value as per the agreed terms.

5.4.3. Provide recommendations for periodic revaluation to avoid underinsurance or over insurance.

NB: Variation

The contract should allow inclusion and exclusion of assets at any given point throughout the contract period. The contract should allow for the inclusion or exclusion of either new or old items during the duration of the contract.

5.5. Claims Management

5.5.1. Appoint a dedicated account manager for merSETA.

5.5.2. Provide clear claims procedures and timelines.

5.5.3. Ensure all claims are processed promptly within agreed service levels.

5.5.4. Provide regular claims status reports to merSETA's Finance or Risk Management department.

5.5.6. Conduct annual policy reviews to ensure continued alignment with asset register updates.

5.6. Service Provider Responsibilities

5.6.1. Provide detailed insurance policy documentation clearly outlining cover, exclusions, excess amounts, and endorsements.

5.6.2. Provide guidance on risk management to minimize potential claims.

5.6.3. Offer flexible payment terms (annual, bi-annual, or quarterly premiums).

5.6.4. Ensure compliance with all applicable insurance legislation and regulatory requirements in South Africa.

5.7. Reporting and Support

5.7.1. Provide quarterly asset insurance status reports.

5. Project Timeline

The contract will commence on 01 December 2025 and will run for a period of two (2) years, ending 30 November 2027, subject to annual review and performance assessment.

6. REQUIREMENTS

6.1. Submit a valid company profile indicating relevant experience in providing corporate asset insurance cover.

6.2. Submit proof of registration with the Financial Sector Conduct Authority (FSCA) and relevant insurance industry bodies.

6.3. Submit reference letters from organizations of similar size and nature, where similar insurance services were provided. The letters must contain:

- Client company name

- Type of service provided
- Contactable reference person
- Period of cover provided

6.4. Provide a detailed methodology outlining how the cover will be implemented, claims will be managed, and assets will be reviewed annually.

6.5. Submit an unabridged CV of the Account Manager or Insurance Specialist who will manage the merSETA portfolio.

6.6. Submit proof of professional indemnity insurance and financial stability of the service provider.

7. RFP Submission

- 7.1 Bid documents may be emailed to quotations@merseta.org.za on or before the closing date and closing time.
- 7.2 The merSETA will only consider bid documents received on or before the closing date and time, regardless of the method used to provide them.

8. Late submissions of the RFP

Submission of quotation(s) received late (after the closing date and time) will not be considered.

9. Request for Proposal (RFP) Rules

- 9.1 The following rules will apply for this Request for Proposal:
- 9.1.1 The price(s) quoted shall be valid for a minimum period of 60 days from the closing date and time of this RFP.
- 9.1.2 The price(s) quoted must be firm and inclusive of value-added tax (VAT) where applicable.
- 9.1.3 The price(s) must include all related expenses, i.e., transport, accommodation, etc. (where applicable).
- 9.1.4 A potential supplier or service provider must be validly registered on the Central Supplier Database (CSD), as hosted by the National Treasury.
- 9.1.5 Only an official purchase order or appointment letter issued by the merSETA will bind the merSETA.

10. RFP Evaluation Process

- 10.1 The RFQ will be evaluated in terms of PPPFA 05 of 2000 and Preferential Procurement Regulation 2022 (80/20). Three (3) stages of evaluation process will be undertaken.

10.1.1. Evaluation Stage 1: Compliance

- 10.1.1.1 All bidders must comply with the administrative requirements outlined in the Standard Bidding Documents and the mandatory requirements listed below. All bidders failing to provide the required information and documentation in this evaluation stage may face disqualification from further evaluation. Failure to comply with the requirements assessed in Stage 1 (compliance) will lead to the disqualification of bids.

Criteria Description	Supporting Documents
In the event of the bidder being in a joint venture (JV), a signed JV agreement must be submitted (where applicable)	Signed JV Agreement SBD forms must be completed for each legal entity Consolidated B-BBEE certificate or sworn affidavit
Submit proof of professional indemnity insurance and financial stability of the service provider.	Valid proof of professional indemnity insurance and financial stability.
Submit proof of registration with the Financial Sector Conduct Authority (FSCA) and relevant insurance industry bodies	Valid FSCA certificate or documentation as proof of registration.

10.1.2 Evaluation Stage 2: Technical Evaluation

- 10.1.2.1 The bids will be evaluated for functionality based on the evaluation criteria and the minimum threshold as shown in the table below. Any bid that fails to meet the overall minimum threshold of **80%** or the minimum score for any individual component thresholds will be disqualified will be disqualified for further evaluation on price and specific goals.

No	Evaluation Criteria	Descriptive Indicators	Points
1.	Bidder Experience: Submit a valid company profile indicating relevant experience in providing corporate asset insurance cover.	Five (5) years and above = 30 points	30
		Three (3) to Four (4) years' experience = 20 points	

No	Evaluation Criteria	Descriptive Indicators	Points
		One (1) to Two (2) years experience = 15 points	
		Below one (1) year experience = 0 point	
2.	Methodology and Project Plan: Provide a detailed methodology outlining how the cover will be implemented, claims will be managed and processing timelines, and assets will be reviewed annually.	Fully complies – The bidder has provided a detailed explanation of the methodology implementation approach which details how the services will be carried out as outlined in the scope and deliverables and timelines = 20 points Poor proposed methodology with no detailed project plan and timeframes provided = 0 points	20
3.	Reference letters: Submit reference letters from organizations of similar size and nature, where similar insurance services were provided. The letters must contain: • Client company name • Type of service provided • Contactable reference person • Period of cover provided	Three (3) or more relevant written reference letters attached = 20 points One (1) or two (2) relevant written reference letters attached = 15 points No or unsatisfactory reference letter(s) attached = 0 points	20
4.	Proposed team experience: Submit an unabridged CV of the Account Manager or Insurance Specialist who will manage the merSETA portfolio.	CVs of the proposed team submitted with a minimum of 3 years relating to insurance management services and Regulatory Exam (RE) certificate = 30 points No submission of the proposed teams' CV with relevant experience and RE certificate = 0	30

No	Evaluation Criteria	Descriptive Indicators	Points
TOTAL WEIGHTING			100
MINIMUM WEIGHTING SCORE			80

Each proposal that passed functional evaluation of **80%** and more, will be on equal footing to proceed to this final round of evaluation on price and specific goals.

10.1.3 Evaluation Stage 3: Preference Point System

10.1.3.1 The 80/20 preference point system shall be applicable to this phase, where 80 points represent the maximum obtainable points for the lowest acceptable price and 20 points represent the specific goals. The bid documentation's table below will award points to a bidder for achieving the specific goals.

The specific goals allocated points in terms of this tender	Number of points Allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Tenderer who has 51% to 100% black people ownership	6	
Tenderer who has 30% to 100% black women ownership	4	
Tenderer who has 30% to 100% black youth ownership	4	
Tenderer who has 30% to 100% White women ownership	2	
Tenderer who has 20% or more owners with disability	4	
Total Points allocated to Specific Goals	20	

Note: Refer to Annexure A for Proof or documentation that may be considered to claim points for specific goal related to persons or categories of persons historically disadvantaged by unfair discrimination.

11. Cost Proposal

11.1. All prices must be VAT inclusive (where applicable) and must be quoted in South African Rand (ZAR).

11.2. The rates of remuneration will be subject to negotiation, not exceeding the applicable rates as contained in the guidelines:

11.2.1 The "Guideline on Fees for Audits done on behalf of the Auditor-General of South Africa (AGSA)¹" as issued by the South African Institute of Chartered Accountants (SAICA);

- 11.2.3 The “Guide on Hourly Fee Rates for Consultants”, as issued by the Department of Public Service and Administration (DPSA); and/or
- 11.2.4 Remuneration guidelines issued by professional service organisations or regulatory bodies, as may be relevant.

12. merSETA’s RIGHTS

- 12.1 The merSETA is entitled to amend any bid condition, bid validity period, RFP terms of reference, or extend the bid closing date, all before the bid closing date. All bidders, to whom the RFP documents have been issued and where the merSETA has records of such bidders, may be advised in writing of such amendments in good time, and any such changes will also be posted on the merSETA’s website under the relevant tender information. Therefore, before submitting their bid response, prospective bidders should regularly check the website to stay informed about any amendments related to this matter.
- 12.2 The merSETA reserves the right not to accept the lowest priced bid or any bid in part or in whole. It normally awards the contract to the bidder who proves to be fully capable of handling the contract and whose bid is functionally acceptable and/or financially advantageous to the merSETA.
- 12.3 The merSETA reserves the right to award this bid as a whole or in part.
- 12.4 The merSETA reserves the right to conduct site visits at bidder’s corporate offices and or at client sites if so required.
- 12.5 The merSETA reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in National Treasury Instruction 02 of 2016/2017: Cost Containment Measures, where relevant.
- 12.6 The merSETA reserves the right to request all relevant information, agreements, and other documents to verify the information supplied in the bid response. The bidder hereby gives consent to the merSETA to conduct background checks, including FICA verification, on the bidding entity and any of its directors, trustees, shareholders or members.
- 12.7 The merSETA reserves the right, at its sole discretion, to appoint any number of vendors to be part of this panel of service providers, if applicable (i.e., where a panel is considered).
- 12.8 The merSETA reserves the right to make a final decision on the interpretation of its tender requirements and responses thereto.

12.9 The merSETA reserves the right to consider the professional conduct and experiences it had with any bidder that rendered similar services to the merSETA in the past 5 years over and above the references put forward by the bidder in its response.

13. UNDERTAKINGS BY THE BIDDER

13.1 By submitting a bid in response to the RFP, the bidder will be taken to have offered to render all or any of the services described in the bid response submitted by it to the merSETA on the terms and conditions and in accordance with the specifications stipulated in this RFQ document.

13.2. The bidder shall prepare for a possible presentation should merSETA require such, and the bidder will be required to make such a presentation within five (5) days from the date the bidder is notified or such a time determined by merSETA of the presentation. Such a presentation may include a practical demonstration of products or services as called for in this RFP.

13.3. The bidder agrees that the offer contained in its bid shall remain binding upon him/her and receptive for acceptance by the merSETA during the bid validity period indicated in this RFP, and its acceptance shall be subject to the terms and conditions contained in this RFP document read with the bid.

13.4. The bidder furthermore confirms that he/she has satisfied himself/herself as to the correctness and validity of his/her bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all his/her obligations under a resulting contract for the services contemplated in this RFP; and that he/she accepts that any mistakes regarding price(s) and calculations will be at his/her risk.

13.5. The successful bidder accepts full responsibility for the proper execution and fulfillment of all obligations and conditions devolving on him/her under the supply agreement and SLA to be concluded with merSETA, as the principal(s) liable for the due fulfillment of such a contract.

13.6 The bidder accepts that all costs incurred in the preparation, presentation, and demonstration of the solution offered by it shall be for the account of the bidder. All supporting documentation and manuals submitted with the bid will become merSETA property unless otherwise stated by the provider(s) at the time of submission.

13.7. Should the bidder require to cede a portion of service(s) in relation to the award, the bidder must inform the merSETA in writing and merSETA reserves the right to accept or reject.

ANNEXURE A

Specific Goal Guide – Preferential points (80/20)

This specific goal guide will be used to assist providers in submitting relevant documents to confirm specific goals.

“**Specific goals**” means specific goals as contemplated in section 2 (1) (d) of the Act which may include contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender and disability including the implementation of programmes of Reconstruction and Development programme as published in government gazette No. 16085 dated 23 November 1994.

Please note that:

- Financial account, management account or auditors’ letter should be submitted confirming turnover of the company determining BBBEE status on Affidavit and B-BBEE CIPC certificate in order for the specific goals can be awarded.

Preferential points for tenders without local content requirements.

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Specific goal	80/20 Preference Point system	Example of Submission	Tick if relevant document submitted	Indicate which document have been submitted
Black People Ownership – 51% or more	6	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
Black Women Ownership – 30% or More	4	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
Black Youth Ownership – 30% or More	4	Valid BBBEE certificate/Affidavit or B-BBEE CIPC		
White Women Ownership – 30% or More	2	Valid B-BBEE certificate/Affidavit or B-BBEE CIPC		
People with Disability (PwD) Ownership	4	Medical certificate		
Total Points allocated to Specific Goals	20			

AUTHORISATION SIGNATORIES TO CONFIRM RFP			
The employee signing below hereby affirms the accuracy of the information requested for the proposal.			
Supply Chain Management Representative			
Full Names	Asisipho Matomane	Date	
Signature			
Technical Representative			
Full Names	Olive Netsianda	Date	
Signature			

