



NAME OF BID	DEVELOPMENT OF FRAMEWORK, CONCEPT, CONTENT, DESIGN, TEST, DEPLOY AND MAINTAIN FINANCIAL LITERACY E-LEARNING PLATFORM
BID NO.	FSCA2025/26-T017
ADVERT DATE	09 March 2026
CLOSING DATE	02 April 2026
CLOSING TIME	11h00 (South African Standard Time, obtained from Telkom SA SOC Limited by dialling 1026)

BIDDER NAME	
ID/REGISTRATION NUMBER	
CSD NUMBER	
CONTACT PERSON	
EMAIL ADDRESS	
TELEPHONE NUMBER	

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Executive Committee:

Commissioner: U. Kamlana | Deputy Commissioners: A. Ludin | K. Gibson | F. Badat

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A. INTRODUCTION TO BID

1. Introduction

- 1.1 The Financial Sector Conduct Authority (FSCA) was established in terms of the Financial Sector Regulation Act No. 9 of 2017. It is responsible for market conduct regulation and supervision of the financial services industry. The objectives of the FSCA are to enhance and support the efficiency and integrity of financial markets, to protect financial customers by promoting their fair treatment by financial institutions, as well as providing financial customers with financial education. The FSCA is a Schedule 3A Public Entity, in terms of the Public Finance Management Act (PFMA).
- 1.2 The vision of the FSCA is to ensure an efficient financial sector where customers are informed and treated fairly and its mission is to ensure a fair and stable financial market, where consumers are informed and protected, and where those that jeopardise the financial well-being of consumers are held accountable. Visit the FSCA website, www.fsc.co.za for further information about the FSCA.
- 1.3 The FSCA operates from offices in Pretoria at Riverwalk Office Park; 41 Matroosberg Road; Ashlea Gardens Extension 6; Menlo Park; Pretoria.
- 1.4 All information, including personal information collected during this process will be treated as confidential, and processed in line with the FSCA Privacy Policy. For more information on how your personal information is processed and how you can exercise your rights in term of applicable information privacy laws, please visit the Privacy Policy on www.fsc.co.za.
- 1.5 Bidders are hereby invited for appointment of a service provider to provide development of framework, concept, content, design, test, deploy and maintain financial literacy e-learning platform. The contract will commence on 1 August 2026 or earlier.
- 1.6 This bid is subject to the Preferential Procurement Policy Framework Act No. 5 of 2000 and the Preferential Procurement Regulations, 2022, Broad-Based Black Economic Empowerment Act, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract. Where, however, the special conditions of contract conflict with the general conditions of contract, the special conditions of contract prevail.

2. Briefing session

- 2.1 A **non-compulsory briefing** session will be held on **20 March 2026** at **11H00** for a maximum of one (1) hour via MS Teams. A link will be provided on the FSCA’s website.

3. Bid enquiries and questions

3.1 Enquiries relating to minor administrative issues with reference to the bid may be directed to:

Nobusi Mazwai
 Supply Chain Management Department
 Tel no.: (012) 422 2855/ (012) 367 7847
 E-mail: tenders@fsc.co.za

3.2 All questions relating to the contents of the bid (conditions, rules, terms of reference etc.) must be forwarded in writing via email to tenders@fsc.co.za by not later than 24 March 2026. Questions received after this date will not be entertained.

3.3 All questions must reference specific paragraph numbers, where applicable.

3.4 All enquiries (received on or before the closing date for enquiries) will be consolidated and the FSCA will publish one response document on the FSCA website (www.fsc.co.za) within three (3) working days after the date indicated in paragraph 3.2.

3.5 No requests for information shall be made to any other person or place and in particular not to the existing provider of this service.

4. Bid submission

4.1 Bid documents may either be placed in the bid box or couriered to the physical address. Bids submitted by means of e-mail, telex facsimile, electronic or similar means shall not be considered.

4.2 Complete documents with supporting annexures shall be packaged, sealed, clearly marked and submitted strictly as follows:

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4.3 The FSCA requires two (2) printed copies, one (1) original and one (1) copy and one electronic copy (in electronic storage media, preferably a CD or flash drive/memory stick) in PDF format all bound in a sealed envelope marked as stated in paragraph 4.2.

4.4 Bids must be properly packaged and deposited on or before the closing date and before the closing time in the bid box situated at the reception area of the FSCA. The physical address of the FSCA is as follows:

Financial Sector Conduct Authority
Riverwalk Office Park, Block B
41 Matroosberg Road (Corner Garsfontein and Matroosberg Roads)
Ashlea Gardens, Extension 6
Menlo Park
Pretoria, 0081

GPS Coordinates	
Latitude	-25.7843344
Longitude	28.268365

4.5 Bid documents will only be considered if received by the FSCA on or before the closing date and time, regardless of the method used to send or deliver such documents to the FSCA.

4.6 **Late submissions will not be accepted.**

4.7 Bidders must initial each page of the bid document on the bottom right hand corner.

5. Pricing schedule

5.1 Only fixed prices will be accepted.

5.2 A pricing schedule must be submitted on a separate sheet from the technical proposal for ease of evaluation. The pricing schedule must be submitted adjacent to the SBD3.1 form in the bid proposal.

B. DEFINITIONS

6. Definitions

- 6.1 Unless inconsistent with or expressly indicated otherwise by the context.
 - 6.1.1 **FSCA** shall mean the Financial Sector Conduct Authority or any successor in title.
 - 6.1.2 **Contractor** shall mean the successful bidder whose bid has been accepted by the FSCA and shall include the bidder’s personal representatives.
 - 6.1.3 **Contract** shall include the General Conditions of Contract and Special Conditions of Contract, the specifications including any schedules attached to the specifications, and any agreement entered into in terms of these Special Conditions of Contract.
 - 6.1.4 **Service** shall mean the development of an e-learning framework, including the concept, content, design, testing, deployment and maintenance of the financial literacy e-learning platform.
 - 6.1.5 **Person** includes any company incorporated or registered as such under any law, any body of persons corporate or unincorporated, any trust. Person, firm or company shall include an authorised employee or agent of such person.

- 6.2 Except where the context indicate otherwise, in this document the singular includes the plural, and with reference to gender, the one includes the other.

C. BID RULES

7. Capabilities and experience of bidders

7.1 Bidders are required to provide all information as necessary to demonstrate their capabilities and experience with regard to the requested services.

8. Form of bid

8.1 The bid shall be signed and witnessed on the form of bid incorporated herein. The schedule of services shall be fully priced in South African Rand to show the total amount of the bid and shall be signed. The certificates, schedules and forms contained in this document shall be completed and signed by the bidder in blue or black ink.

8.2 **Please note:** No correction fluid such as Tippex or similar product is allowed. All changes must be scratched out and a signature next to each change

8.3 Where the space provided in the bound document is insufficient, separate schedules may be drawn up in accordance with the prescribed formats. These schedules shall be bound with a suitable contents page and submitted with the bid documents.

9. Signing of bid

9.1 The bid must be signed by a person who is duly authorised to do so.

10. Bid all inclusive

10.1 The bidder must provide an all-inclusive fee statement in the bid.

11. Alterations to bid documents

11.1 No unauthorised alteration or addition shall be made to the form of bid, to the schedule of quantities of services to be rendered or to any other part of the bid documents. If any such alteration or addition is made or if the schedule of quantities of services to be rendered, or other schedules or certificates are not properly completed, such submission may be disqualified.

12. Qualifications on bid

12.1 Bids submitted in accordance with this bid document shall be without any qualifications.

13. FSCA'S rights

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- 13.1 The FSCA is entitled to amend any bid conditions, bid validity period, bid specifications, or extend the bid’s closing date, all before the bid closing date. The FSCA reserves a right to extend the bid validity period before its expiry period. All bidders, to whom the bid documents have been issued and where the FSCA have record of such bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the FSCA’s website under the relevant bid information. All prospective bidders should, therefore, ensure that they visit the website regularly and before they submit their bid response to ensure that they are kept updated on any amendments in this regard.
- 13.2 The FSCA reserves the right not to accept the lowest priced bid or any bid in part or in whole.
- 13.3 The FSCA reserves the right to award this bid as a whole or in part.
- 13.4 The FSCA reserves the right to conduct site visits at bidder’s corporate offices and/or at client sites if so required.
- 13.5 The FSCA reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in the National Treasury Instruction Note 03 of 2017/2018: Cost Containment Measures, where relevant.
- 13.6 The FSCA reserves the right to request all relevant information, agreements and other documents to verify information supplied in the bid response. The bidder hereby gives consent to the FSCA to conduct background checks on the bidding entity and any of its directors/trustees/shareholders/members.

14. Undertaking by bidder

- 14.1 By submitting a bid in response to this bid, 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 FSCA on the terms and conditions and in accordance with the specifications stipulated in this bid document.
- 14.2 The bidder shall prepare for a possible presentation should the FSCA require such and the bidder shall be notified thereof in good time before the actual presentation date. Such presentation may include a practical demonstration of products or services as called for in this bid.
- 14.3 The bidder agrees that the offer contained in its bid shall remain binding upon him and receptive for acceptance by the FSCA during the bid validity period indicated in this document and calculated from the bid closing date. Its acceptance shall be subject to the terms and conditions contained in this bid document read with the bid.

- 14.4 The bidder furthermore confirms that they have satisfied themselves as to the correctness and validity of their 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 their obligations under a resulting contract for the services contemplated in this bid; and that they accepts that any mistakes regarding price(s) and calculations will be at their risk.
- 14.5 The successful bidder accepts full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on them under the supply agreement and Service Level Agreement (SLA) to be concluded with the FSCA, as the principal(s) liable for the due fulfilment of such contract.
- 14.6 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 this bid will become FSCA property unless otherwise stated by the bidder/s at the time of submission.

15. Central supplier database

- 15.1 The FSCA will not award any bid to a supplier who is not registered as a prospective supplier on the Central Supplier Database (CSD) as required in terms of National Treasury Circular No. 3 of 2015/2016 and National Treasury SCM Instruction Note 4A of 2016/2017.
- 15.2 The supplier is responsible to continuously update their information, including personal information on the CSD to ensure that it is complete, accurate and not misleading.

16. Supplier performance management

- 16.1 Supplier Performance Management is viewed by the FSCA as a critical component in ensuring it acquires value for money and maintains good supplier relations between the FSCA and all its suppliers.
- 16.2 The successful bidder shall upon receipt of written notification of an award, be required to conclude an SLA with the FSCA (where applicable), which will form an integral part of the supply agreement. The SLA will serve as a tool to measure, monitor and assess the supplier’s performance and ensure effective delivery of service, quality and value-add to the FSCA’s business.
- 16.3 The successful bidder will be required to comply with the above conditions, and also provide a scorecard on how their product/service offering is being measured to achieve the objectives of this condition.

17. Cancellation of contract

17.1 If the FSCA becomes aware or is satisfied that any person (including an employee, partner, director or shareholder of the bidder or a person acting on behalf of or with the knowledge of the bidder), firm or company; amongst others:

- 17.1.1 is executing a contract with the FSCA unsatisfactorily,
- 17.1.2 has in any manner been involved in a corrupt act or provided a gift or remuneration in relation to any officer or employee of the FSCA, in connection with obtaining or executing a contract,
- 17.1.3 has acted in bad faith, in a fraudulent manner or committed an offence in obtaining or executing a contract,
- 17.1.4 has in any manner influenced or attempted to influence the awarding of an FSCA’s bid,
- 17.1.5 has when advised that his bid has been accepted, given notice of his inability to execute or sign the contract or to furnish any security required,
- 17.1.6 has engaged in any anti-competitive behaviour, including having entered into any agreement or arrangement, whether legally binding or not, with any other person, firm or company to refrain from bidding for this contract, or relating to the bid price to be submitted by either party,
- 17.1.7 has disclosed to any other person, any information relating to this bid, except where disclosure, in confidence, was necessary to obtain quotations required for the preparation of the bid,

the FSCA may, in addition to any other legal recourse, which it may have, cancel the contract between the FSCA and such a person, firm or company and/or resolve that no bid from such a person will be favourably considered for a period, as prescribed by the National Treasury.

17.2 Any restriction imposed upon any person shall apply to any other person with which such a person is actively associated.

18. Applicable laws

18.1 The laws of the Republic of South Africa shall be applicable to each contract created by the acceptance of a bid and each bidder shall indicate an address in the Republic and specify it in the bid as his *domicilium citandi et executandi* where any legal process may be served on him.

18.2 Each bidder shall accept the jurisdiction of the courts of the Republic of South Africa.

19. Reasons for disqualification of bid

19.1 The FSCA reserves the right to disqualify any unacceptable bid as defined in the PPPFA Act and such disqualification may take place without prior notice to the offending bidder. The grounds for disqualification amongst others could include the following:

- 19.1.1 bidders who submit incomplete information and documentation as specified in the requirements of this bid document;
- 19.1.2 bidders who submit information that is fraudulent, factually untrue or inaccurate;
- 19.1.3 bidders who receive information not available to other potential bidders through any means;
- 19.1.4 bidders who do not comply with mandatory requirements, if stipulated in the bid document;
- 19.1.5 bidders who fail to attend a compulsory briefing session and sign bid register, if stipulated in the bid advert and/ or in this bid document; and/or
- 19.1.6 bidders who fail to comply with FICA (Financial Intelligence Centre Act) requirements (where applicable).

20. Delegation of authority

20.1 The FSCA may delegate any power vested in it by virtue of these Terms of Reference to an officer or employee of the FSCA.

21. Bid rules are binding

21.1 The bid rules as well as the instructions given in the official bid notice shall be binding on all bidders submitting bid applications for the service or services set out in the bid document.

22. Language of contract

22.1 The bid documents are drafted in English and any contract, which originates from the acceptance of the bid, will be interpreted and construed in English.

D. TERMS OF REFERENCE

23. Objectives

23.1 The broad objectives of this bid include:

23.1.1 To provide bidders with adequate information to understand and respond to the FSCA’s requirements to appoint a service provider for the development of an e-learning framework, including a concept, content, design, testing, deployment and maintenance of the financial literacy e-learning platform service for a period of three (3) years.

23.1.2 To ensure uniformity in the responses received from each prospective service provider.

23.1.3 To provide a structured framework for the evaluation of proposals.

24. Background

24.1 The Financial Sector Regulation Act No. 9 of 2017, mandates the FSCA to provide financial education initiatives aimed at improving the financial literacy of South Africans. In support of these initiatives, the FSCA distributes a variety of printed and digital resources in various formats to new and existing financial customers, nationwide.

24.2 The FSCA therefore seeks to develop a comprehensive digital e-learning solution aimed at enhancing financial literacy among South Africans. This initiative is grounded on the outcomes of the 2025 Digital feasibility study, which assessed the effectiveness of digital platforms in delivering financial education tailored to diverse demographic and socio-economic groups. The report is available as follows:
<https://www.fscamymoney.co.za/Research%20Documents/202425%20FSCA%20Research/FSCA%20-%20Digital%20Financial%20Literacy%20and%20Education%20Feasibility%20Study%20-%202020%20Feb%202025.pdf> and forms the foundation of this request.

24.3 The e-learning platform should: deliver accessible, inclusive, and impactful financial education to South Africans through a digitally enabled learning platform; motivate engagement with the platform to attract and maintain the interest and use by financial consumers, households and business owners; deliver financial literacy content that is easy to navigate and tailored to the realities of different audiences; and assist in improving the knowledge and understanding of financial concepts and its application in real-life scenarios, thereby support financial decision making in support of improved financial well-being.

- 24.4 The e-learning platform will further promote consumer protection, capability and wellness by strengthening the understanding of financial products, services and recourse mechanisms, and establish a scalable, secure and modern e-learning platform that integrates learning technology, analytics and engagement tools.
- 24.5 The target audience is 16+ South African consumers across urban and rural areas, youth, woman, low-income earners, digitally underserved populations and community-based organisations and educators.
- 24.6 The e-learning solution will be housed as a plug-in on the FSCA's dedicated consumer education SharePoint website, available on www.fscamymoney.co.za.

25. Purpose of the request for bid

- 25.1 The purpose of this bid is to appoint a service provider to develop an e-learning framework, concept and respective content, to design, test, deploy and maintain the FSCA's financial literacy e-learning platform for a period of three (3) years.

26. Scope of work

26.1 The contractor will be required to:

- 26.1.1 Develop a project plan for the implementation of the project that is divided into phases, as per the scope, and includes payment milestones for FSCA approval.

Note that the project plan must respond to the recommendations provided in the Digital Feasibility Study. Refer to this link <https://www.fscamymoney.co.za/Research%20Documents/202425%20FSCA%20Research/FSCA%20-%20Digital%20Financial%20Literacy%20and%20Education%20Feasibility%20Study%20-%202020%20Feb%202025.pdf>

- 26.1.2 Develop an e-learning framework which must include the following:
 - 26.1.2.1 Audience-centered design. i.e. incorporate insights from the Digital Feasibility Study on preferred digital channels, content formats and design and layout.
 - 26.1.2.2 Curriculum structure, i.e. modular learning paths, progressive learning and localised content.
 - 26.1.2.3 Content delivery (multimedia integration, multilingual support, scenario-based learning).

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- 26.1.2.4 Learning objectives, curriculum structure, content types, pedagogical approach (instructional design). Refer to Annexure A.
- 26.1.3 Supply a customisable Learning Management System (LMS) inclusive of subscriptions and licenses to meet the following technical specifications:
- 26.1.3.1 Reusable licenses for up to 10,000 users. These licenses will allow for completed user access to be reassigned to new users over a three (3) year period.
- 26.1.3.2 The solution must be compliant with standards and specifications for e-learning system (SCORM).
- 26.1.3.3 Accessibility, performance and inclusivity i.e. fast load times, offline access and accessibility tools.
- 26.1.3.4 Technical infrastructure i.e. data security and analytics dashboard.
- 26.1.3.5 Security and privacy compliance with data protection regulations such as POPIA.
- 26.1.3.6 User experience (UX) design such as accessibility (sub-titles and voice overs) and navigation.
- 26.1.4 Customise the LMS according to the requirements as detailed in this scope of work. The purpose hereof is to assess the quality and appropriateness of the LMS in line with global trends.
- Note: The service provider will be required to present the LMS to the FSCA for approval prior to further development.
- 26.1.5 Develop a Business Requirement Specification (BRS) and Functional Requirement Specification (FRS) document.
- 26.1.6 Develop and present three (3) e-learning concepts (look and feel) to the FSCA with a rationale. The FSCA will select and approve one concept for either further refinement or approval to implement. The FSCA will provide a repository of illustrated characters which can be converted into motion graphics and animated as well as the Corporate Identity (CI) for branding adherence.
- 26.1.7 Develop five (5) financial literacy modules as per the topics identified in the Digital feasibility study. The topics are 1) *Income and Expenditure*, 2) *Savings, including Investments*, 3) *Credit and Debt*, 4) *Financial*

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planning and (Financial) Goal setting and 5) Protection and Resilience. Reference can be made to the FSCA's MyMoney Learning Series content as a basis for adaptation to an e-learning environment, available at www.fscamymoney.co.za. Refer to the timelines in section 28, for the staggered delivery of the module content.

- 26.1.8 Integrate the FSCA approved content as developed in 26.1.7 into the e-learning platform.
- 26.1.9 Develop the e-learning platform and include the functionality as per the FSCA approved framework. Refer to Annexure A and B.
- 26.1.10 Conduct two (2) focus group testing sessions with a total of sixteen (16) persons (eight (8) persons per session) for the purpose of the focus group testing on the e-learning platform. The number of persons indicated are for the purposes of evaluation.
- Note: The focus groups must be representative of the South African population, of varying demographics and literacy levels in Gauteng. The service provider will be required to invite two (2) FSCA representatives to each focus group session.
- 26.1.11 Develop a report of the outcomes and recommendations post the focus group testing sessions.
- 26.1.12 Make amendments to e-learning platform and content as per recommendations in the report as per 26.1.11.
- 26.1.13 Test, rectify and update content errors and technical glitches on e-learning platform as and when required for the duration of the contract.
- 26.1.14 Deploy the e-learning solution.
- 26.1.15 Develop a social media marketing and implementation plan. The purpose is to create awareness and visibility of the e-learning platform amongst varying demographics to increase usage.

Note: The marketing period must be a month i.e. 20 posts (5 x 60 seconds video/animation (including a demonstration video), 5 x SlideShare posts, 10 x infographics). The FSCA and its appointed service provider will be responsible for posting the material on the FSCA's social media platforms and providing monthly social media reporting.

- 26.1.16 Design and create the content as per the FSCA approved social media marketing and implementation plan in 26.1.15, strictly adhering to the FSCA's Corporate Identity (CI).

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26.1.17 Maintain and enhance the platform post-deployment in agreement with the FSCA using platform analytics and user engagement data to guide continuous improvement and content optimisation.

26.1.18 Provide maintenance support after deployment as follows:

26.1.18.1 Provide ongoing support including bug fixes, updated and user assistance.

26.1.18.2 Prepare comprehensive technical and user documentation for administrators and learners.

26.1.18.3 Update content as per user feedback, refresh interactive quizzes, improve UI/UX for better navigation and user experience and introduce new engagement challenges in line with the specialised requirements in Annexure A for the approval of the FSCA.

26.1.18.4 Update modules based on financial trends, update regulatory and compliance information, including refreshing video content.

26.1.18.5 Provide general technical user support and have dictated support email address.

26.1.19 Submit monthly tracking and usage reports to the FSCA. as per the specifications in Annexure A.

26.1.20 Deliver all related files to the FSCA via OneDrive. These include HTML and open files of the interactive e-learning content as well as the e-learning framework, concept documents, design concept, final artwork, images, graphics and fonts in high and low resolution (open file), royalty free music and voice-overs one week after project completion.

27. Timelines

27.1. The timelines for the three (3) year contract as provided in table 1 below.

Table 1

TASK	DESCRIPTION	TIMELINE
1.	Kick off meeting.	One (1) day after issuing of Purchase Order (PO)
2.	Project plan for FSCA approval.	Three (3) days after issuing of PO.

TASK	DESCRIPTION	TIMELINE
3.	E-learning Framework for FSCA approval.	Seven (7) working days after completion of task 2.
4.	Customisable LMS presented in line with scope, inclusive of BRS and FRS for FSCA approval.	12 working days after completion of task 3.
5.	Develop and present three (3) design concepts for FSCA Approval.	15 working days after completion of task 4.
6.	Develop five (5) e-learning module, instructional design storyboards for FSCA approval.	Four (4) weeks after completion of task 5.
7.	Develop e-learning platform.	Four months after the completion of task 6.
8.	Integrate FSCA approved content into e-learning platform.	One (1) week after the completion of task 7.
9.	Conduct focus group testing on e-learning platform functionality and content.	Two (2) weeks after completion of task 8.
10.	Report of outcomes and recommendations for FSCA approval.	Two (2) weeks after completion of task 9.
11.	Test, rectify and update any content or technical errors as per report.	Three (3) weeks after completion of task 10.
12.	E-learning solution tested, deployed, error-free, live as per FSCA approval.	One (1) month after the completion of task 11.
13.	Social media marketing plan, including the design and content elements for FSCA approval.	Six (6) weeks after completion of task 12.
14.	Maintain and enhance the platform post-deployment, inclusive of content updates.	Six (6) weeks after completion of task 13.
15.	Monthly tracking reports.	
16.	Deliver all final files to the FSCA.	24 months after completion of task 14 and 15.

Note: The framework and two modules are due on or before 31 March 2026. The e-learning platform must be developed, tested and deployed on or before 31 March 2027. Three additional modules, monitoring, tracking and reporting completed and approved on or before 31 March 2028.

28. Bid conditions

28.1 The following bid conditions are applicable to this bid:

28.1.1 The bidder must ensure that all activities related to the scope of work must be approved by the FSCA.

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- 28.1.2 The bidder must allow for three (3) review rounds on all deliverables. Spelling and grammatical errors will not be considered as a review round.
- 28.1.3 The bidder must align to the outcomes as per the Digital Feasibility Study.
- 28.1.4 The bidder must proof-read all content developed for the e-learning solution after each review round, prior to submission to the FSCA.
- 28.1.5 The bidder must ensure that the e-learning solution adheres to the FSCA's branding guidelines.
- 28.1.6 The bidder must consult with the FSCA's ICT department to ensure adherence to the FSCA's security policies.
- 28.1.7 The bidder must work closely with the FSCA's ICT and Communication and Language Services departments throughout all phases of the project to ensure alignment and adherence to ICT policies and protocols in addition to branding compliance.
- 28.1.8 The bidder must Meet with the FSCA team as and when required for the duration and successful implementation/support of the project. Note that some meetings will be required onsite at the offices of the FSCA in Pretoria due to the technical nature of the project.
- 28.1.9 The bidder must ensure that the e-learning solution works on multiple devices and operating systems i.e. Desktop, laptop, mobile and tablet and cater for persons with low data.
- 28.1.10 The bidder must do all their homework and work out all the components and logistics for successful implementation of the e-learning solution upfront and foresee and mitigate risks. The service provider must offer solutions within scope. The service provider must manage expectations and seek clarity where required.
- 28.1.11 The bidder must propose a multidisciplinary team with relevant qualifications (instructional design, development, editing, UX/UI, etc.).
- 28.1.12 All work produced for the FSCA is the property of the FSCA.

Note: The recommended bidder will not be permitted to introduce additional unquoted costs. The FSCA reserves the right to eliminate the bidder at any stage of this assignment should the bidder be unable to meet the set service level measurements requirements in paragraph 29 of this document.

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29. Bid evaluation

29.1 The proposals will be evaluated as follows.

29.1.1 Evaluation Stage One: Compliance

Compliance with administrative requirements stated in the Standard Bidding Documents and the mandatory requirements as listed in paragraph 30 below. In this evaluation stage, all bidders that fail to provide the required information and documentation, will be disqualified from further evaluation.

29.1.2 Evaluation Stage Two: Functional evaluation (Desktop evaluation)

In this evaluation stage, bidders are expected to obtain a minimum of 80 out of 100 points to proceed to the next evaluation stage. Failure to obtain the prescribed minimum points will automatically disqualify the bid offer from proceeding to the next evaluation stage.

29.1.3 Evaluation Stage Three: Preference Point System

The 80/20 preference point system shall be applicable to this phase, where 80 points represent maximum obtainable points for the lowest acceptable price, and 20 points represents specific goals. Points will be awarded to a bidder for attaining the specific goal points in accordance with the table as listed in the bid documentation.

29.1.4 Evaluation Stage Four: Site Inspection

At the FSCA’s discretion, a site inspection may be conducted at this stage. The FSCA will visit the selected bidders’ premises with the objective of verifying information as contained in their respective bid documents. Should it be discovered during a site inspection or presentation that the information submitted by the bidder is inconsistent with what is on their current premises of business, such bidders will be disqualified.

30. Functional evaluation (Desktop)

30.1 The bid/proposal will be evaluated for functionality and be rated as follows:

Table 2

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
A. Project plan	A.1. The bidder must submit a project plan that includes deliverables in alignment with the scope of work.	A.1.1. The bidder did not submit the project plan.	0	20
		A.1.2. The bidder has submitted a project plan which meets some of the requirements.	1-3	
		A.1.3. The bidder submitted a project plan which meets or exceeds all the requirements.	4-5	
B. Company profile	B.1. The bidder must submit the company's profile which indicates number of years of experience in developing, customising and marketing e-learning platforms in alignment with the scope of work.	B.1.1. The bidder did not submit a company profile.	0	20
		B.1.2. The bidder submitted a company profile which meets some of the requirements.	1-3	
		B.1.3. The bidder submitted a company profile which meets or exceeds all the requirements.	4-5	
C. Reference Letter	C.1. The bidder must submit three reference letters with company letterheads in line with the requirements of the scope of	C.1.1. The bidder did not submit reference letters	0	20

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
	work, completed in the past three years. Information provided must include the following: i) Name of company ii) Contact person name iii) Contact person telephone number and email address iv) Contract duration and completion date v) Brief description of work completed.	C.1.2. The bidder submitted reference letters which meet some of the requirements.	1-3	
		C.1.3. The bidder submitted reference letters which meet or exceed all the requirements.	4-5	
D. CVs and professional qualifications	D.1. The bidder must submit a list of the project team and their CV's with at least three years' experience in the relevant expertise that are in alignment with the scope of work. The list of CVs must include: i) UX /UI Designer (UX research, responsive design) ii) Front-end developer (HTML, CSS, JavaScript, SharePoint integration) iii) E-learning specialist/instructional	D.1.1. The bidder did not submit CVs.	0	20
		D.1.2. The bidder submitted CVs which meet some of the requirements.	1-3	

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
	designer (SCORM, LMS integration, content development) iv) Web and e-learning developer v) Project leader vi) Graphic Designer vii) Content developer viii) Proof-reader ix) Social Media Marketer. Note: It is noted that individuals can perform dual roles. The above CVs are the minimum requirements.	D.1.3. The bidder submitted CVs which meet or exceed all the requirements.	4-5	
E. Samples (through an electronic link)	E.1. The bidder must provide an active electronic link demonstrating samples of the e-learning platforms previously developed that are aligned with the scope of work.	E.1.1. The bidder did not submit any samples.	0	20
		E.1.2. The bidder submitted an active electronic link demonstrating less than three samples that meet some of the requirements.	1-3	
		E.1.3. The bidder submitted an active electronic link demonstrating three or more samples which meet or exceed all the requirements.	4-5	
				100

31. Preference point system

31.1 General conditions

31.1.1 The following preference point systems are applicable to invitations to tender:

the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and

the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

31.1.2 The applicable preference point system for this tender is the **80/20** preference point system.

31.2 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.

31.3 The maximum points for this tender are allocated as follows:

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

31.4 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.

31.5 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.

32. Formulae for Procurement of Goods and Services

32.1 Points Awarded for Price

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32.1.1 The 80/20 Preference Point Systems

A maximum of 80 points is allocated for price on the following basis:

80/20

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

Where

P_s	=	Points scored for price of tender under consideration
P_t	=	Price of tender under consideration
P_{min}	=	Price of lowest acceptable tender

33. Points Awarded for Specific Goals

33.1.1 In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender.

33.1.2 In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—:

- an invitation for tender for income-generating contracts, that either the 80/20 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
- any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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Specific goals for the tender and points claimed are indicated per the table below.

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women ownership of 51% or more of the enterprise shareholding.	10	
Enterprises owned by 51% or more black people	10	
<p>Note: In the event that the bidder is claiming specific goals, the FSCA will allocate points claimed, provided that proof of evidence such as valid BBEE Certificates/sworn affidavits, CIPC etc. is attached. Failure to submit the acceptable verifiable proof will result in an allocation of 0 points.</p>		

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

34. Standard bidding documents

34.1 The following compulsory additional information are required. Failure to complete, and supply any of these documents might lead to disqualification from this bid:

Table 3

Invitation to bid	SBD 1
Pricing Schedule	SBD 3.1
Bidder's Disclosure	SBD 4
Preference Points Claim Form for Preferential Procurement Regulations 2022 Should a bidder not complete and sign the SBD6.1, the bidder will be allocated 0.00 points for specific goals	SBD 6.1

35. Timeline of the bid process

35.1 The period of validity of the bid and the withdrawal of offers, after the closing date and time are 120 days, expiring on 29 July 2026. The project timeframes of this bid are set out below:

Table 1

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on Government e-tender portal / print media / Tender Bulletin	09 March 2026
2.	Non-compulsory briefing session	20 March 2026
3.	Questions relating to bid from bidder(s)	24 March 2026
4.	Bid closing date	02 April 2026
5.	Compliance: Bid Evaluation Committee	09 April 2026
6.	Functional Evaluation: (Desktop evaluation)	13 April 2026
7.	Preference Point System: Bid Evaluation Committee	20 April 2026
8.	Bid Award: Bid Adjudication Committee	28 April 2026
9.	Notification of the outcome to the bidders	15 May 2026

35.2 All dates and times in this bid are South African Standard Time.

35.3 Any time or date in this bid is subject to change at the FSCA's discretion. The establishment of a time or date in this bid does not create an obligation on the

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to demand that any action be taken on the date established. The bidder accepts that, if the FSCA extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

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E. ANNEXURE A: SPECIALISED REQUIREMENTS

The information below provides specialised requirements in response to the scope of work which are informed by the outcomes of the Digital Feasibility Study for the development of the e-learning solution.

Table 5

TASK	DESCRIPTION
1. Include interactive and engaging content	<p>The objective is to promote active engagement with financial literacy content, ensuring users can interact with and learn financial concepts through practical applications.</p> <p>1.1. Interactive quizzes, polls and feedback loops integrated into each learning module to reinforce understanding.</p> <p>1.2. Scenarios that mimic real-life financial situations, storytelling to encourage users to apply concepts and make the learning relatable.</p> <p>1.3. Instant feedback for correct and incorrect responses to guide learning progress.</p>
2. Incorporation of gaming features, competition and rewards elements	<p>The objective is to make learning fun, competitive and immersive, driving continued use of the digital financial literacy platforms and reinforcing the financial principles learnt.</p> <p>2.1. Gamification techniques, such as point scoring, levels and achievement badges.</p> <p>2.2. Users earn rewards (points, badges, certificates) when they complete modules, financial challenges and financial goal achievements (e.g. savings challenges and budgeting simulations) and advance through the platform.</p> <p>2.3. A friendly competition element where users can compete against themselves (progress tracking) or others (leaderboard).</p> <p>2.4. No affiliations, or links to rewards, partners or financial vouchers to be accommodated.</p>
3. Implore flexibility in access	<p>The objective is to ensure a user-friendly experience that allows users to integrate learning not their daily routine without pressure or time constrains.</p>

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	<p>3.1. The digital financial literacy platforms should support a flexible learning experience, allowing users to enter and exit at their convenience.</p> <p>3.2. Users can pause learning at any point, and the digital financial literacy platforms should have an automatic 'save and resume' feature for easy access to the content at a later time.</p> <p>3.3. Short learning modules (micro-learning) in e-learning. Ensure that users can easily fit learning into their schedule without overwhelming the user.</p>
<p>4. Use simple, clear and fun language</p>	<p>The objective is to ensure financial concepts are easily understood by users with varying levels of financial literacy.</p> <p>4.1. Use of simple, jargon-free language to explain and apply complex financial concepts.</p> <p>4.2. Fun language and tone that aligns with the gaming elements but retains a level of professionalism to maintain trust in financial information.</p> <p>4.3. Interactive animations and short videos to explain difficult topics in a fun and visual way.</p> <p>4.4. Include storytelling.</p>
<p>5. The e-learning modules to incorporate:</p>	<p>5.1. Artificial intelligence for personalised learning paths based on user behaviour and AI adaptation of course difficulty based on user performance/user behaviour triggers to detect when users disengage and recommend relevant content to re-engage user.</p> <p>5.2. Adaptive learning: users get progressive difficulty levels based on performance.</p> <p>5.3. Audio (notification sounds, background music, Artificial intelligence voice-overs are welcome but must be customised to a South African environment).</p> <p>5.4. Video or animation with sub-titles, voice-overs and built in graphics.</p> <p>5.5. Gamification</p> <p>5.6. Animation (e.g. whiteboard animation)</p>

	<p>5.7. Tests and quizzes (during/post the e-learning journey), as well as a final ultimate quiz.</p> <p>5.8. Consumer user experience surveys and prompts (during/post).</p> <p>5.9. Behavioral nudges and push notifications.</p>
6. Bite-sized learning	<p>The objective is to prevent information overload and to allow users to complete financial literacy content in short, manageable segments.</p> <p>6.1. The e-learning modules need to be broken down into short, digestible segments. (micro-learning).</p> <p>6.2. Each segment should focus on a specific financial concept or decision-making skill (e.g. budgeting, saving, investing, risk management).</p> <p>6.3. Progress is tracked and users can review previous lessons to reinforce learning.</p>
7. Financial knowledge in the digital space	<p>The objective is to equip users with both financial knowledge and the digital skills needed to engage safely and productively with online financial tools.</p> <p>7.1. Digital literacy elements are integrated into the content to help users navigate online financial tools such as mobile banking, budgeting apps and investment platforms.</p> <p>7.2. Teach users how to access and mitigate digital risks (e.g. identifying phishing and securing online transactions.)</p> <p>7.3. Provide examples of real-world digital financial tools and demonstrate how to use them effectively. (e.g. simulation exercises)</p>
8. Maintenance	<p>8.1. A hybrid approach, combining scheduled updates and AI-driven responsive content, is required for maintaining engagement and sustaining user interest in the e-learning platform.</p> <p>8.2. Regular scheduled updates include, updating the content based on user feedback, refresh interactive quizzes and case studies, improve UI/UX for better navigation and user experience, as well as introducing new engagement elements (e.g. challenges) – all whilst considering data consciousness.</p>
9. Implementation considerations	<p>9.1. Platform accessibility: Ensure the mobile application is accessible on smartphones and tablets, and the eLearning modules on mobile devices and desktops to</p>

	<p>cater to various user preferences and increase accessibility.</p> <p>9.2. Platform efficiency: Minimise data usage while interacting with the digital financial literacy tool, considering the limitations of mobile data costs in South Africa. This could include offline access to certain content and low data versions of interactive elements.</p> <p>9.3. User feedback: Incorporate regular feedback mechanisms to fine-tune the digital financial literacy tool features based on user experience and preferences, ensuring the tool evolves to meet the needs of its audience.</p>
<p>10. Usage and tracking reports, system and content improvements</p>	<p>10.1. No. of registered users and demographic over a period.</p> <p>10.2. No. of active users and demographics over a period.</p> <p>10.3. Time spent, completion rates, repeat visits.</p> <p>10.4. Pre/post test scores in relation to rewards/badges.</p> <p>10.5. Most popular times and least popular times of access platform access over a period.</p> <p>10.6. Which content is rated highly, and which content is rated poorly over a period.</p> <p>10.7. Provide users scores in relation to each province, age, employment, educational level.</p> <p>10.8. List of the number of users that have completed the CED e-learning training and their scores for individual short quizzes, final quiz and Ultimate quiz for a specific period. It must be listed in alphabetical order.</p> <p>10.9. Highest results.</p> <p>10.10. Lowest results.</p> <p>10.11. Most popular module/least popular module.</p>

	<p>10.12. Questions answered incorrectly (this helps us to identify trends, perhaps the question needs to be replaced or updated, or rephrased for better understanding and comprehension).</p> <p>10.13. Highlight areas of improvement/ provide recommendations.</p>
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DEVELOPMENT OF FRAMEWORK, CONCEPT, CONTENT, DESIGN, TEST, DEPLOY AND MAINTAIN FINANCIAL LITERACY E-LEARNING PLATFORM



F. STANDARD BIDDING DOCUMENTS

Standard Bidding Document (SBD 1)

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE FINANCIAL SECTOR CONDUCT AUTHORITY					
BID NUMBER:	FSCA2025/26-T017	CLOSING DATE:	02 April 2026	CLOSING TIME:	11H00
DESCRIPTION	DEVELOPMENT OF FRAMEWORK, CONCEPT, CONTENT, DESIGN, TEST, DEPLOY AND MAINTAIN FINANCIAL LITERACY E-LEARNING PLATFORM				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
Riverwalk Office Park, Block B					
41 Matroosberg Road (Corner Garsfontein and Matroosberg Roads)					
Ashlea Gardens, Extension 6, Menlo Park					
Pretoria, South Africa, 0081					
BIDDING PROCEDURE AND TECHNICAL ENQUIRIES MAY BE DIRECTED TO					
DEPARTMENT	Supply Chain Management Department				
FACSIMILE NUMBER	Not applicable				
E-MAIL ADDRESS	tenders@fsc.co.za				
TELEPHONE NUMBER	012 367 7847				
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		

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CELLPHONE NUMBER			
FACSIMILE NUMBER	CODE		NUMBER
E-MAIL ADDRESS			
VAT REGISTRATION NUMBER			
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:	OR	CENTRAL SUPPLIER DATABASE No: MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]			
<i>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	<i>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS			
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO DOES THE ENTITY HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <input type="checkbox"/> YES <input type="checkbox"/> NO IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.			

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED– (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER’S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE.”

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:.....
(Proof of authority must be submitted e.g. company resolution)

DATE:

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Standard Bidding Document (SBD 3.1)

PRICING SCHEDULE – FIRM PRICES
(Purchases)

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

NAME OF BIDDER:.....BID NO.: **FSCA2025/26-T017**

CLOSING TIME **11:00**

CLOSING DATE: **02 April 2026**

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
		R.....

- Required by:

- At:

- Brand and model

- Country of origin

- Does the offer comply with the specification(s)? *YES/NO

- If not to specification, indicate deviation(s)

- Period required for delivery

*Delivery: Firm/not firm

- Delivery basis

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

**** “all applicable taxes” includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.**

*Delete if not applicable

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Standard Bidding Document (SBD 4)

BIDDER’S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder’s declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state?

YES/NO.....

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature	Date
.....
Position	Name of bidder

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Standard Bidding Document (SBD 6.1)

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included);
 - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included); and
 - the applicable preference point system for this tender is the **80/20** preference point system.
- 1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for price and specific Goals.
- 1.3 The maximum points for this tender are allocated as follows:

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

- 1.4 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.
- 1.5 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.

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2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. Formulae for procurement of Goods and Services

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

A maximum of 80 points is allocated for price on the following basis:

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

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
 - (c) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used

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to determine the applicable preference point system; or

(d) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

Note to tenderers: 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 system)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprises owned by 51% or more black people	10	
Women ownership of 51% or more of the enterprise shareholding.	10	
<p>Note: In the event that the bidder is claiming specific goals, the FSCA will allocate points claimed, provided that proof of evidence such as valid BBEE Certificates/sworn affidavits, CIPC etc. is attached. Failure to submit the acceptable verifiable proof will result in an allocation of 0 points.</p>		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that

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the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

 SIGNATURE(S) OF TENDERER(S)
SURNAME AND NAME:
DATE:
ADDRESS:

G. ADMINISTRATIVE CHECKLIST

Hereunder is a checklist to ensure that the bid document is complete in terms of administrative compliance. Please ensure that the following forms have been completed and signed and that all documents, as requested, are attached to the tender document.

ITEM	DOCUMENT REFERENCE		ACTION TO BE TAKEN	YES/NO
1.	SBD 1	Invitation to bid	Is the form duly competed and signed?	
2.	SBD 3.1	Pricing Schedule	Is the form duly competed and signed?	
3.	SBD 4	Declaration of Interest	Is the form duly competed and signed?	
4.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2022	Is the form duly competed, Specific goals points claimed, and form signed?	
5.	Tender submission		<i>Two (2) printed copies. (One (1) original and One (1) copy of original) submitted?</i>	
			One (1) electronic copy submitted?	

I, the undersigned (name)
certify that the information furnished on this checklist is true and correct.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder