



NAME OF BID	PROVISION OF MEDICAL AID BROKERAGE SERVICES
BID NO.	FSCA2024/25-P001
ADVERT DATE	10 JUNE 2024
CLOSING DATE	04 JULY 2024
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	

**Riverwalk Office Park, Block B; 41 Matroosberg Road
(Corner Garsfontein and Matroosberg Roads)
Ashlea Gardens, Extension 6
Menlo Park; Pretoria; South Africa; 0081**

P.O. Box 35655; Menlo Park; 0102

Switchboard: +27 12 428 8000

Website: www.fsca.co.za



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 jeopardize 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 Medical Aid Brokerage Services. The contract will commence on 1 September 2024 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 There is no briefing session for this bid.

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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) 367 7847/(012) 422 2855
E-mail: tenders@fsca.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@fsca.co.za by not later than 18 June 2024. 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.fsca.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 posted (preferably by registered mail) or 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:

Bid No	FSCA2024/25-P001
Bid Name	PROVISION OF MEDICAL AID BROKERAGE SERVICES

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

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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 may also be posted (preferably by registered mail) to:

PO Box 35655
 Menlo Park
 Pretoria
 0102

4.6 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.

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

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

5. Pricing

5.1 There are no cost implications for the FSCA and its employees for this bid. The compensation of the successful bidder shall be as per the provisions of the Medical Aid Scheme Act, Act No.131 of 1998.

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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.

6.1.1. **Contractor** shall mean the successful bidder whose bid has been accepted by the FSCA and shall include the bidders’s personal representatives.

6.1.1. **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.

6.1.1. **Service** shall mean provision of shall mean provision medical aid brokerage services to the FSCA for a period of 5 years.

6.1.1. **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 indicates otherwise, in this document the singular includes the plural, and with reference to gender, the one includes the other.

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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

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.

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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

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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,

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- 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:

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- 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.

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D. TERMS OF REFERENCE**23. Objectives**

23.1 The broad objectives of this bid include to:

23.1.1 Provide bidders with adequate information to understand and respond to the FSCA's for the provision of medical aid brokerage services to the FSCA for a period of five (5) years.

23.1.2 Ensure uniformity in the responses received from each prospective service provider; and

23.1.3 Provide a structured framework for the evaluation of proposals.

24. Purpose of the request for bid

24.1 The purpose of this bid is to appoint a contractor to provide medical aid brokerage services for a period of 5 years.

25. Scope of work

25.1 The services proposed must meet at least the following:

25.1.1 Health care consulting to the FSCA and its employees.

25.1.2 Facilitation and administration of the FSCA initiated wellness days with FSCA accredited medical aid schemes for identified wellness services. The bidder must provide a detailed proposal of services which will be provided in this respect.

25.1.3 Medical aid membership management of the FSCA which should include, but not limited to, time on site, help desk services for the FSCA members, escalated query assistance, face-to-face consultations regarding membership options, site visits to address members queries.

25.1.4 Consulting services which include, but not limited to:

25.1.4.1 Independent broker advice (provide information on relationships with medical aid schemes),

25.1.4.2 Help for the FSCA employees,

25.1.4.3 One-on-one consultation pertaining to medical aid cover,

25.1.4.4 Induction and on-going training,

25.1.4.5 Escalated query assistance,

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25.1.4.6 Regular product presentations and training, and

25.1.4.7 Communication, including newsletters, hot topics etc.

25.2 Strategic services must include the following:

25.2.1 Year-end revision process,

25.2.2 Review of Profile of members,

25.2.3 Scheme and option comparisons,

25.2.4 Legislative review and updates, and

25.2.5 Market trend analysis and forecasting.

25.3 Reporting (submission) by the successful bidder should include, but not limited to the following reports:

25.3.1 Billing results and analysis,

25.3.2 Members option reports (quarterly),

25.3.3 Risk management,

25.3.4 Executive reporting,

25.3.5 Benchmarking review,

25.3.6 Membership and contribution management,

25.3.7 Medical aid bill consolidation services, and

25.3.8 Other reports which will provide unique value-added services.

26. Bid Conditions

26.1 The following special conditions are applicable to this bid:

26.1.1 The bidder must be accredited with the Council for Medical Schemes and for ease of reference, bidders are required to provide proof of registration.

26.1.2 The Key Individuals of the bidder must be fully and validly accredited with the Council for Medical Schemes and for ease of reference, bidders are required to provide proof of registration.

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26.1.3 The bidder must be registered as a Financial Service Provider with the health benefits product (Product 1.16) and for ease of reference, bidders must provide proof of registration.

26.2 The FSCA will only consider a proposal if the relevant bidder meets the above mentioned conditions as specified in paragraphs 26.1.1, 26.1.2 and 26.1.3. The FSCA reserves the right to verify the accreditation status with the accreditation body. Should the verification process fail, your bid will be eliminated from further evaluation. Where a bidder fails to meet the bid special conditions, the bid will be considered unacceptable and will be eliminated from further evaluation.

27. Bid evaluation

27.1 The proposals will be evaluated as follows.

27.1.1 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.

27.1.2 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.

27.1.3 Evaluation stage three: Presentation to the FSCA

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.

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28. Functional evaluation (Desktop)

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

Table 1

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	SUB-WEIGHT	WEIGHT
A. Capability of the bidder to provide the services.	A.1. The bidder must submit an organisational profile detailing the number of years of experience in providing medical brokerage services to corporate clients. The organisational profile must detail the services offered to those corporate clients	A.1.1. The bidder did not submit an organisational profile	0	50	80
		A.1.2. The bidder submitted an organisational profile detailing less than three years of experience in providing medical aid brokerage services to corporate clients which meets all the requirements.	1		
		A.1.3. The bidder submitted an organisational profile detailing three to six years of experienced in providing medical aid brokerage services to corporate clients which meets all the requirements.	2-3		
		A.1.4. The bidder submitted an organisational profile detailing seven and more years of experienced in providing medical aid brokerage services to corporate clients which meets all the requirements.	4-5		
	A.2. The bidder must submit written reference letters on client letterhead for medical aid brokerage services. The references must not be	A.2.1. The bidder did not submit reference letters.	0	30	
		A.2.2. The bidder submitted one to three references letters that meet all the requirements.	1-3		

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ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	SUB-WEIGHT	WEIGHT
	older than three years from closing date of this tender. Reference letters must include: a) Name of client, b) Contact person, c) Contact number, d) Email address, and e) Description of service provided.	A.2.3. The bidder submitted four or more reference letters that meet and/or exceed all the requirements.	4-5		
B. Comprehensive and detailed quality review process for medical brokerage service.	B.1. The bidder must submit a comprehensive and detailed quality review processes in place for medical brokerage services.	B.1.1. The bidder did not submit a quality review processes.	0	20	20
		B.1.2. The bidder submitted quality review process which is unclear or incomplete.	1-3		
		B.1.3. The bidder submitted comprehensive and detailed quality review processes which meets all the requirements of the ToR.	4 - 5		
					100

29. Presentation or demonstration

- 29.1 Bidder (s) who have successfully passed the Functional Evaluation will be invited to do a presentation.
- 29.2 Presentation dates and times will be communicated.
- 29.3 Bidder (s) invited to the presentation will be expected to present at least one (1) case study of how they have successfully rendered medical aid brokerage services to a corporate company/client.
- 29.4 Functionality criteria on the presentation to the FSCA by shortlisted bidders will be as follows:

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
B. Understanding of the FSCA requirements.	B.1. Bidders are required to demonstrate thorough understanding of the FSCA requirements as outlined in the TOR.	B.1.1. Bidder demonstrated their understanding of the FSCA requirements but did not meet all requirements.	0 - 3	20
		B.1.2. Bidder demonstrated thorough understanding of the FSCA requirements or exceeding requirements.	4 - 5	
C. Methodology	C.1. The bidder to demonstrate their tried and tested approach and/ or methodology of delivering medical aid brokerage services aligned to the FSCA requirements.	C.1.1. The bidder demonstrated their tried and tested approach and methodology of delivering medical aid brokerage services but did not meet all FSCA requirements.	0 - 3	50
		C.1.2. The bidder demonstrated their tried and tested approach and methodology of delivering medical aid	4 - 5	

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ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
		brokerage services that met all FSCA requirements.		
D. Success evaluation criteria	D.1. The bidder will demonstrate a clear plan on how they will educate and advise staff on medical aid benefits.	D.1.1. The bidder did not demonstrate a clear plan.	0 - 3	30
		D.1.2. The bidder demonstrated a clear plan which meets all the requirements.	4 - 5	
				100

30. Standard bidding documents

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

Table 2

Invitation to bid	SBD 1
Bidder's Disclosure	SBD 4

31. Timeline of the bid process

31.1 The period of validity of the bid and the withdrawal of offers, after the closing date and time are 90 days, expiring on 30 September 2024. The project timeframes of this bid are set out below:

Table 3

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on Government e-tender portal / print media / Tender Bulletin	10 June 2024
2.	Questions relating to bid from bidder(s)	18 June 2024
3.	Bid closing date	04 July 2024
4.	Compliance: Bid Evaluation Committee	09 July 2024
5.	Functional Evaluation: (Desktop evaluation)	16 July 2024
6.	Presentation or demonstration (On-site)	23 July 2024
7.	Bid Award: Bid Adjudication Committee	25 July 2024
8.	Notification of the outcome to the bidders	01 August 2024

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

31.3 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 part of the FSCA to take any action or create any right in any way for any bidder 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.

E. 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:	FSCA2024/25-P001	CLOSING DATE:	04 July 2024	CLOSING TIME:	11H00
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DESCRIPTION	PROVISION OF MEDICAL AID BROKERAGE SERVICES
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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 / 012 422 7159

SUPPLIER INFORMATION

NAME OF BIDDER			
POSTAL ADDRESS			
STREET ADDRESS			
TELEPHONE NUMBER	CODE	NUMBER	
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
<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.					

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 institution	State

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring 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.

YES/NO

2.2.1 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 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

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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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

F. 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 4	Declaration of Interest	Is the form duly competed and signed?	
3.	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