



NAME OF BID	DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA
BID NO.	FSCA2023/24-T014
CLOSING DATE	30 JANUARY 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)  
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**Executive Committee:**

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

## Contents

<b>A.</b>	<b>INTRODUCTION TO BID</b>	<b>4</b>
1.	Introduction	4
2.	Briefing session	4
3.	Bid enquiries and questions	4
4.	Bid submission	5
5.	Pricing schedule	6
<b>B.</b>	<b>DEFINITIONS</b>	<b>7</b>
6.	Definitions	7
<b>C.</b>	<b>BID RULES</b>	<b>8</b>
7.	Capabilities and experience of bidders	8
8.	Form of bid	8
9.	Signing of bid	8
10.	Bid all inclusive	8
11.	Alterations to bid documents	8
12.	Qualifications on bid	8
13.	FSCA'S rights	8
14.	Undertaking by bidder	9
15.	Central supplier database	10
16.	Supplier performance management	10
17.	Cancellation of contract	10
18.	Applicable laws	11
19.	Reasons for disqualification of bid	11
20.	Delegation of authority	12
21.	Bid rules are binding	12
22.	Language of contract	12
<b>D.</b>	<b>TERMS OF REFERENCE</b>	<b>13</b>
23.	Objectives	13
24.	Background	13
25.	Purpose of the request for bid	13
26.	Scope of work	14
27.	Contract conditions	16
28.	Bid evaluation	17
29.	Functional evaluation (Desktop)	18
30.	Preference point system	20

31.	FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES .....	20
32.	POINTS AWARDED FOR SPECIFIC GOALS .....	21
33.	Standard bidding documents .....	23
34.	Timeline of the bid process .....	23
<b>E.</b>	<b>ANNEXES .....</b>	<b>25</b>
	ANNEXURE A: RESOURCE SPECIFICATIONS .....	25
<b>F.</b>	<b>STANDARD BIDDING DOCUMENTS .....</b>	<b>33</b>
<b>G.</b>	<b>ADMINISTRATIVE CHECKLIST .....</b>	<b>44</b>

## 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.fsca.co.za](http://www.fsca.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.fsca.co.za](http://www.fsca.co.za).
- 1.5 Bidders are hereby invited for appointment of a service provider to provide design and layout of translated resources for the FSCA. The contract will commence on 01 April 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.

### 3. Bid enquiries and questions

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

ISSUE DATE		Wednesday, 13 December 2023		PAGE 4 OF 44	
	TITLE	TOR FSCA202324-T014 DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA		INITIAL HERE →	BIDDER'S INITIALS

Nobusi Mazwai/ Mulweli Ratshili  
 Supply Chain Management Department  
 Tel no.: (012) 422 2855/ (012) 422 2914  
 E-mail: [tenders@fsc.co.za](mailto: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](mailto:tenders@fsc.co.za) by not later than 22 January 2023. 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](http://www.fsc.co.za)) within three (3) working days after the date in 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:

<b>Bid No</b>	FSCA2023/24-T014
<b>Bid Name</b>	DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA

- 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 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 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 SBD3.1/2/3 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 bidders'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 provision of design and layout of translated resources for the FSCA.
- 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


- 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

<b>ISSUE DATE</b>	Wednesday, 13 December 2023			<b>PAGE 9 OF 44</b>
	<b>TITLE</b>	TOR FSCA202324-T014 DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA	<b>INITIAL HERE →</b>	<b>BIDDER'S INITIALS</b>

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:

ISSUE DATE	Wednesday, 13 December 2023			PAGE 11 OF 44
	TITLE	TOR FSCA202324-T014 DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA	INITIAL HERE →	BIDDER'S INITIALS

- 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 to design and layout translated resources (brochures) for the FSCA for a period between three (3) and six (6) months.

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 In terms of the Financial Sector Regulation Act No. 9 of 2017, the FSCA is mandated 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 resources to financial customers, nationwide.

24.2 During 2020-2021, the FSCA developed and translated 15 resources into all official South African languages. The English versions of the resources are available in design and layout, however the design and layout for the 10 other languages is required as part of this bid. The English versions of the resources can be viewed on [www.fscamymoney.co.za](http://www.fscamymoney.co.za).

24.3 The fully designed English resources have been completed and placed on the [www.fscamymoney.co.za](http://www.fscamymoney.co.za) website. Furthermore, the objective is to use the completely designed English resources must be used as a clear design template for the design and layout of the resources existing in the other South African official languages. No translation will be required from the contractor.

24.4 The translated resources are currently placed on the CED website in Microsoft word/PDF format (no design and layout). Thus, a service provider is required to use the design used in the English versions, and to apply this to the IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele languages. The approved design and layout of the resources need to be provided to the FSCA in low- and high-resolution PDF files, as well as the open (Adobe InDesign and Illustrator) files.

### 25. Purpose of the request for bid

25.1 The purpose of this bid is to appoint a contractor to provide design and layout services of translated resources to the FSCA. The project must be completed for a period between three (3) and six (6) months.

## 26. Scope of work

26.1 The contractor will be required to design and layout the IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele translated resources.

26.1.1 Design, layout and submit approved resources to the FSCA as per the description and quantities specified in Table 1 below. Refer to Annexure A for additional resource specifications. See the link to the content below.

<https://www.fscamymoney.co.za/Pages/Resources/Guides-and-Manuals.aspx?RootFolder=%2FTraining%20Documents%2FDesign%20and%20Layout%20of%20Translated%20Resources&FolderCTID=0x012000FE24763E2F7F99449612508B762B705E&View={98582012-6C8A-4CE8-8B7D-9F7B76320F32}>

Note:

All bidders must take note of the word count of the translated resources as this will influence the number of pages. i.e., translated resources tend to be longer than the English versions and may require more pages. Some resources have been redesigned in IsiZulu and Setswana, therefore, the total number of resources to be designed will not be uniform across brochure topics. See table 1 below for language guidance.

**Table 1**

NO.	RESOURCE	SIZE	WORD COUNT (ENGLISH)	LANGUAGES TO BE DEVELOPED
1.	Important tips when buying insurance policies	A5	2134	Sesotho, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
2.	Understanding the Importance of a Will	A5	4719	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
3.	Illegal tracers want your unclaimed benefits money	A5	1885	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
4.	Will your investment take you to the top?	A5	3062	Sesotho, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele

NO.	RESOURCE	SIZE	WORD COUNT (ENGLISH)	LANGUAGES TO BE DEVELOPED
5.	Savvy Savers Budget Booklet	A6	2439	Sesotho, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
6.	Unclaimed pension benefits	A5	1590	Sesotho, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
7.	Learn more about life insurance	A5	4593	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
8.	Non-life Insurance	A5	3881	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
9.	Shares	A5	4861	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
10.	Credit Insurance	A5	3156	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
11.	Retirement Planning	A5	4261	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
12.	Collective Investment Scheme	A5	5386	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
13.	Medical Aid vs Health Insurance	A5	3156	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele

NO.	RESOURCE	SIZE	WORD COUNT (ENGLISH)	LANGUAGES TO BE DEVELOPED
14.	Funeral Insurance Cover	A5	3478	Sesotho, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele
15.	Credit Ratings	A5	2427	IsiZulu, Sesotho, Setswana, Afrikaans, IsiXhosa, Sepedi, Xitsonga, Tshivenda, Siswati and IsiNdebele

## 27. Contract conditions

27.1 The following contract conditions are applicable to this bid:

- 27.1.1 The resources are available in English with an approved design and layout. The appointed contractor will be required to replicate the same design and layout for the translated resources. Note that translated resources, are usually more words and can increase the page numbers. Therefore, a word count for each language and topic is provided (Annexure B).
- 27.1.2 The appointed contractor must make provision for three amendments to each resource. Spelling and grammar changes will not be considered as an amendment.
- 27.1.3 The appointed contractor must complete the project between three (3) to a maximum of six (6) months after the issuing of the purchase order by the FSCA.

## 28. Bid evaluation

28.1 The proposals will be evaluated as follows.

### 28.1.1 Evaluation Stage One: Compliance

Compliance with administrative requirements stated in the Standard Bidding Documents and the mandatory requirements as listed in paragraph 33 below. In this evaluation stage, all bidders that fail to provide the required information and documentation, will be disqualified from further evaluation.

### 28.1.2 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.

### 28.1.3 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.

### 28.1.4 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.

## 29. Functional evaluation (Desktop)

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

**Table 2**

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
A. References	A.1. The bidder must submit reference letters where similar work was conducted in the past five (5) years from the closing date of this tender. The list must include this following information: a) Name of client, b) Nature of work done (project description), and c) Project period	A.1.1. The bidder did not submit reference letters.	0	30
		A.1.2. The bidder submitted less than three (3) reference letters which meets all the requirements.	1-3	
		A.1.3. The bidder submitted three (3) or more reference letters which meets or exceeds all the requirements.	4-5	
B. Organisational profile and credentials	B.1. The bidder must submit a company profile	B.1.1. The bidder has not submitted a business profile	0	30

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
	with the following information: a) Overview of the business, its products/ services; b) Years in operation (must have a minimum of 3 years' experience) c) List of staff and their credentials as per the requirements of this TOR.	B.1.2. The bidder has submitted a business profile which does not meet all the requirements.	1-3	
		B.1.3. The bidder has submitted a business profile which meets or exceeds all the requirements.	4-5	
C. Portfolio of evidence	C.1. The bidder must submit a portfolio of evidence in the form of samples in PDF format or as an electronic link where design and layout were carried out in the past.	C.1.1. The bidder did not submit a portfolio of evidence.	0	40
		C.1.2. The bidder submitted a portfolio of evidence with less than three (3) samples which meet all the requirements.	1-3	
		C.1.3. The bidder submitted a portfolio of evidence with three (3) or more samples which meet all the requirements.	4-5	
				100

### 30. Preference point system

#### 30.1 General conditions

30.1.1 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

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

30.1.3 Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

30.2 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.

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

	POINTS
<b>PRICE</b>	80
<b>SPECIFIC GOALS</b>	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>


30.4 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.

30.5 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.

### 31. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

#### 31.1 POINTS AWARDED FOR PRICE

##### 31.1.1 THE 80/20 PREFERENCE POINT SYSTEMS

ISSUE DATE	Wednesday, 13 December 2023			PAGE 20 OF 44
	TITLE	TOR FSCA202324-T014 DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA	INITIAL HERE →	BIDDER'S INITIALS

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

## 32. POINTS AWARDED FOR SPECIFIC GOALS

32.1.1 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.

32.1.2 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—:

- (a) 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 to determine the applicable preference point system; or
- (b) 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.

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	
<b>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 BBBEE Certificates/sworn affidavits, CIPC etc. is attached. Failure to submit the acceptable verifiable proof will result in an allocation of 0 points.</b>		

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

### 33. Standard bidding documents

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

**Table 1**

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

### 34. Timeline of the bid process

- 34.1 The period of validity of the bid and the withdrawal of offers, after the closing date and time are 120 days, expiring on 29 May 2024. The project timeframes of this bid are set out below:

**Table 2**


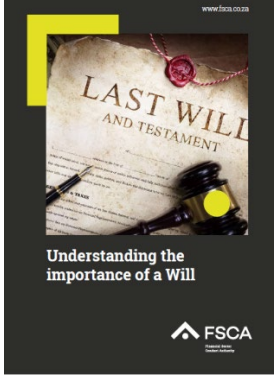
STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on Government e-tender portal / print media / Tender Bulletin	13 December 2023
2.	Questions relating to bid from bidder(s)	12 January 2024
3.	Bid closing date	30 January 2024
4.	Compliance: Bid Evaluation Committee	07 February 2024
5.	Functional Evaluation: (Desktop evaluation)	14 February 2024
6.	Preference Point System: Bid Evaluation Committee	28 February 2024
7.	Bid Award: Bid Adjudication Committee	06 March 2024
8.	Notification of the outcome to the bidders	13 March 2024


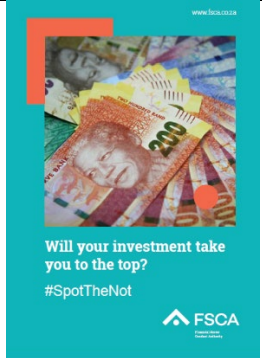
- 34.2 All dates and times in this bid are South African Standard Time.


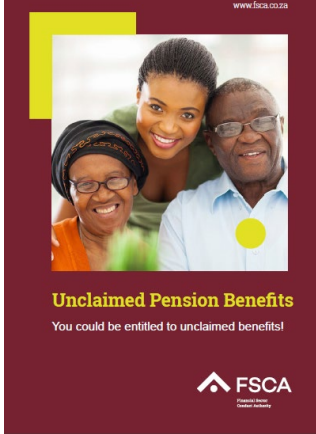
- 34.3 Any time or date in this bid is subject to change at the FSCA's discretion. The establishment of a time or date in this bid does not create an obligation on the part of the FSCA to take any action or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if the FSCA extends the deadline for bid submission (the Closing Date) for

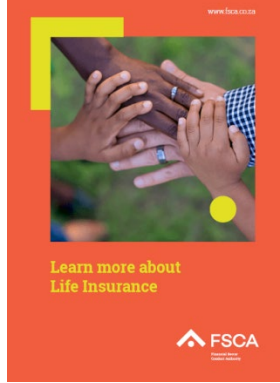
any reason, the requirements of this bid otherwise apply equally to the extended deadline.


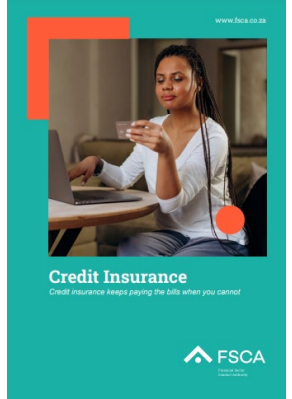
**E. ANNEXES****ANNEXURE A: RESOURCE SPECIFICATIONS**



NO	TITLE	DESIGN SPECIFICATION	IMAGE OF RESOURCE
1.	Important tips when buying insurance policies	<b>Size:</b> A5 <b>Word count per language</b> <b>Sesotho:</b> 2817 <b>Afrikaans:</b> 2025 <b>IsiXhosa:</b> 1652 <b>Sepedi:</b> 2886 <b>Xitsonga:</b> 2604 <b>Tshivenda:</b> 2609 <b>Siswati:</b> 1577 <b>IsiNdebele:</b> 1594 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to the resource:  <a href="https://www.fscamoney.co.za/Publications/Consumer%20Tips%202021.pdf">https://www.fscamoney.co.za/Publications/Consumer%20Tips%202021.pdf</a> </p>
2.	Understanding the importance of a will	<b>Size:</b> A5 <b>Word count per language</b> <b>English:</b> <b>IsiZulu:</b> 3343 <b>Sesotho:</b> 5944 <b>Setswana:</b> 4793 <b>Afrikaans:</b> 4718 <b>IsiXhosa:</b> 3431 <b>Sepedi:</b> 6273 <b>Xitsonga:</b> 5554 <b>Tshivenda:</b> 5355 <b>Siswati:</b> 3407 <b>IsiNdebele:</b> 3312 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Publications/Will%20and%20Testament%202021.pdf">https://www.fscamoney.co.za/Publications/Will%20and%20Testament%202021.pdf</a> </p>
3.	Illegal tracers want your unclaimed benefits money	<b>Size:</b> A5 <b>Word count per language</b> <b>IsiZulu:</b> 1405 <b>Sesotho:</b> 2558	<p>Link to online resource:</p>

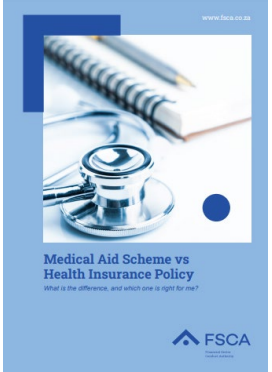
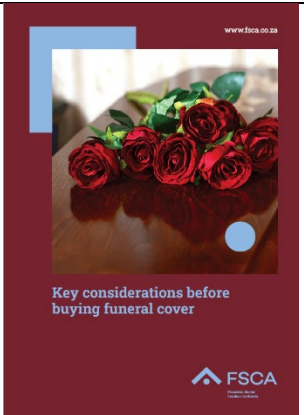
NO	TITLE	DESIGN SPECIFICATION	IMAGE OF RESOURCE
		<b>Setswana: 2387</b> <b>Afrikaans: 1754</b> <b>IsiXhosa: 1415</b> <b>Sepedi: 2767</b> <b>Xitsonga: 2317</b> <b>Tshivenda: 2240</b> <b>Siswati: 1370</b> <b>IsiNdebele: 1375</b> <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <a href="https://www.fscamoney.co.za/Financial%20Protection/Illegal%20tracers%20want%20your%20unclaimed%20benefits%20money!.pdf">https://www.fscamoney.co.za/Financial%20Protection/Illegal%20tracers%20want%20your%20unclaimed%20benefits%20money!.pdf</a>
4.	Will your investment take you to the top?	<b>Size: A5</b> <b>Word count per language</b> <b>Sesotho: 3794</b> <b>Afrikaans: 3052</b> <b>IsiXhosa: 2316</b> <b>Sepedi: 3886</b> <b>Xitsonga: 3629</b> <b>Tshivenda: 3601</b> <b>Siswati: 2164</b> <b>IsiNdebele: 2206</b> <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <b>Link to online resource:</b> <a href="https://www.fscamoney.co.za/Publications/Pyramid%20Schemes%202021.pdf">https://www.fscamoney.co.za/Publications/Pyramid%20Schemes%202021.pdf</a>


NO	TITLE	DESIGN SPECIFICATION	IMAGE OF RESOURCE
5.	Savvy savers budget booklet	<p><b>Size:</b> A6 Booklet that has a pocket in the back cover for slips and receipts. <b>Refer to second image for the example of the back inner cover pocket.</b></p> <p><b>Word count per language</b>  <b>Sesotho: 3384</b>  <b>Afrikaans: 2503</b>  <b>IsiXhosa: 2016</b>  <b>Sepedi: 3519</b>  <b>Xitsonga:</b>  <b>Tshivenda: 3120</b>  <b>Siswati: 1964</b>  <b>IsiNdebele: 1921</b></p> <p><b>Artwork:</b> will be provided in hi-resolution/PDF format</p>	 <p><b>Link to online resource:</b>  <a href="https://www.fscamoney.co.za/Publications/Budget%20booklet%20-%20Savvy%20Savers%202021.pdf">https://www.fscamoney.co.za/Publications/Budget%20booklet%20-%20Savvy%20Savers%202021.pdf</a></p>
6.	Unclaimed pension benefits	<p><b>Size:</b> A5</p> <p><b>Word count per language</b>  <b>Sesotho: 2191</b>  <b>Afrikaans: 1530</b>  <b>IsiXhosa: 1208</b>  <b>Sepedi: 2528</b>  <b>Xitsonga: 1952</b>  <b>Tshivenda: 1902</b>  <b>Siswati: 1180</b>  <b>IsiNdebele: 1147</b></p> <p><b>Artwork:</b> will be provided in hi-resolution/PDF format</p>	 <p><b>Link to online resource:</b>  <a href="https://www.fscamoney.co.za/Publications/Budget%20booklet%20-%20Savvy%20Savers%202021.pdf">https://www.fscamoney.co.za/Publications/Budget%20booklet%20-%20Savvy%20Savers%202021.pdf</a></p>

NO	TITLE	DESIGN SPECIFICATION	IMAGE OF RESOURCE
			<a href="https://www.fscamoney.co.za/Publications/Unclaimed%20Pension%20Benefits%202021.pdf">money.co.za/Publications/Unclaimed%20Pension%20Benefits%202021.pdf</a>
7.	Learn more about life insurance	<b>Size:</b> A5 <b>Word count per language</b> <b>IsiZulu:</b> 3425 <b>Sesotho:</b> 6083 <b>Setswana:</b> 5004 <b>Afrikaans:</b> 4506 <b>IsiXhosa:</b> 3259 <b>Sepedi:</b> 6438 <b>Xitsonga:</b> 5562 <b>Tshivenda:</b> 5477 <b>Siswati:</b> 3456 <b>IsiNdebele:</b> 3471 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Publications/Life%20(Long-term)%20Insurance%202021.pdf">https://www.fscamoney.co.za/Publications/Life%20(Long-term)%20Insurance%202021.pdf</a> </p>
8.	Non-life insurance	<b>Size:</b> A5 <b>Word count per language</b> <b>IsiZulu:</b> 2872 <b>Sesotho:</b> 5080 <b>Setswana:</b> 4877 <b>Afrikaans:</b> 3745 <b>IsiXhosa:</b> 2743 <b>Sepedi:</b> 5462 <b>Xitsonga:</b> 4519 <b>Tshivenda:</b> 4656 <b>Siswati:</b> 2922 <b>IsiNdebele:</b> 2876 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Publications/Non-Life%20(short-term)%20Insurance%202021.pdf">https://www.fscamoney.co.za/Publications/Non-Life%20(short-term)%20Insurance%202021.pdf</a> </p>

NO	TITLE	DESIGN SPECIFICATION	IMAGE OF RESOURCE
9.	Shares	<b>Size:</b> A5 <b>Word count per language</b> <b>IsiZulu:</b> 3382 <b>Sesotho:</b> 5989 <b>Setswana:</b> 5953 <b>Afrikaans:</b> 4801 <b>IsiXhosa:</b> 3328 <b>Sepedi:</b> 6375 <b>Xitsonga:</b> 5443 <b>Tshivenda:</b> 5574 <b>Siswati:</b> 3321 <b>IsiNdebele:</b> 3491 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p><b>Shares</b> An introduction to buying shares and how this can help you to build wealth</p> <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Financial%20Safeguard/An%20introduction%20to%20buying%20shares%20and%20how%20this%20can%20help%20you%20to%20build%20wealth.pdf">https://www.fscamoney.co.za/Financial%20Safeguard/An%20introduction%20to%20buying%20shares%20and%20how%20this%20can%20help%20you%20to%20build%20wealth.pdf</a> </p>
10.	Credit insurance	<b>Size:</b> A5 <b>Word count per language</b> <b>IsiZulu:</b> 2283 <b>Sesotho:</b> 4086 <b>Setswana:</b> 3843 <b>Afrikaans:</b> 3079 <b>IsiXhosa:</b> 2272 <b>Sepedi:</b> 4229 <b>Xitsonga:</b> 3771 <b>Tshivenda:</b> 3768 <b>Siswati:</b> 2270 <b>IsiNdebele:</b> 2340 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p><b>Credit Insurance</b> Credit insurance keeps paying the bills when you cannot</p> <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Financial%20Knowledge/Credit%20Insurance.pdf">https://www.fscamoney.co.za/Financial%20Knowledge/Credit%20Insurance.pdf</a> </p>

NO	TITLE	DESIGN SPECIFICATION	IMAGE OF RESOURCE
11.	Retirement planning	<b>Size:</b> A5 <b>Word count per language</b> <b>IsiZulu:</b> 3343 <b>Sesotho:</b> 6373 <b>Setswana:</b> 5904 <b>Afrikaans:</b> 4544 <b>IsiXhosa:</b> 3296 <b>Sepedi:</b> 6586 <b>Xitsonga:</b> 5202 <b>Tshivenda:</b> 5475 <b>Siswati:</b> 3284 <b>IsiNdebele:</b> 3400 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Financial%20Safeguard/The%20key%20to%20a%20comfortable%20retirement.pdf">https://www.fscamoney.co.za/Financial%20Safeguard/The%20key%20to%20a%20comfortable%20retirement.pdf</a> </p>
12.	Collective investments	<b>Size:</b> A5 <b>Word count per language</b> <b>IsiZulu:</b> 3971 <b>Sesotho:</b> 6708 <b>Setswana:</b> 6603 <b>Afrikaans:</b> 5145 <b>IsiXhosa:</b> 4100 <b>Sepedi:</b> 6663 <b>Xitsonga:</b> 6222 <b>Tshivenda:</b> 6296 <b>Siswati:</b> 4077 <b>IsiNdebele:</b> 3950 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Publications/Collective%20Investments%20Schemes%202021.pdf">https://www.fscamoney.co.za/Publications/Collective%20Investments%20Schemes%202021.pdf</a> </p>

NO	TITLE	DESIGN SPECIFICATION	IMAGE OF RESOURCE
13.	Medical aid vs health insurance	<b>Size:</b> A5 <b>Word count per language</b> <b>IsiZulu:</b> 3892 <b>Sesotho:</b> 6856 <b>Setswana:</b> 6495 <b>Afrikaans:</b> 4720 <b>IsiXhosa:</b> 4019 <b>Sepedi:</b> 6725 <b>Xitsonga:</b> 6129 <b>Tshivenda:</b> 6670 <b>Siswati:</b> 3792 <b>IsiNdebele:</b> 3892 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Financial%20Safeguard/Medical%20Aid%20vs%20Health%20Insurance%20Policy.pdf">https://www.fscamoney.co.za/Financial%20Safeguard/Medical%20Aid%20vs%20Health%20Insurance%20Policy.pdf</a> </p>
14.	Funeral insurance cover	<b>Size:</b> A5 <b>Word count per language</b> <b>Sesotho:</b> 4399 <b>Afrikaans:</b> 3329 <b>IsiXhosa:</b> 2592 <b>Sepedi:</b> 4488 <b>Xitsonga:</b> 4054 <b>Tshivenda:</b> 4375 <b>Siswati:</b> 2603 <b>IsiNdebele:</b> 2598 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to resource:  <a href="https://www.fscamoney.co.za/Financial%20Protection/Key%20considerations%20before%20buying%20funeral%20cover.pdf">https://www.fscamoney.co.za/Financial%20Protection/Key%20considerations%20before%20buying%20funeral%20cover.pdf</a> </p>

NO	TITLE	DESIGN SPECIFICATION	IMAGE OF RESOURCE
15.	Credit ratings	<b>Size:</b> A5 <b>Word count per language</b> <b>Sesotho:</b> 3090 <b>Afrikaans:</b> 2376 <b>IsiXhosa:</b> 2212 <b>Sepedi:</b> 3389 <b>Xitsonga:</b> 2858 <b>Tshivenda:</b> 3301 <b>Siswati:</b> 1763 <b>IsiNdebele:</b> 1964 <b>Isizulu:</b> 1890 <b>Setswana:</b> 2770 <b>Artwork:</b> will be provided in hi-resolution/PDF format	 <p>Link to online resource:  <a href="https://www.fscamoney.co.za/Financial%20Knowledge/Credit%20Ratings.pdf">https://www.fscamoney.co.za/Financial%20Knowledge/Credit%20Ratings.pdf</a> </p>

**F. STANDARD BIDDING DOCUMENTS****Standard Bidding Document (SBD 1)**
**PART A**  
**INVITATION TO BID**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE FINANCIAL SECTOR CONDUCT AUTHORITY</b>					
BID NUMBER:	<b>FSCA2023/24- T014</b>	CLOSING DATE:	<b>30 JANUARY 2024</b>	CLOSING TIME:	<b>11H00</b>
DESCRIPTION	<b>DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA</b>				
<b>BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)</b>					
<b>Riverwalk Office Park, Block B</b>					
<b>41 Matroosberg Road (Corner Garsfontein and Matroosberg Roads)</b>					
<b>Ashlea Gardens, Extension 6, Menlo Park</b>					
<b>Pretoria, South Africa, 0081</b>					
<b>BIDDING PROCEDURE AND TECHNICAL ENQUIRIES MAY BE DIRECTED TO</b>					
DEPARTMENT	<b>Supply Chain Management Department</b>				
FACSIMILE NUMBER	<b>Not applicable</b>				
E-MAIL ADDRESS	<a href="mailto:tenders@fsca.co.za">tenders@fsca.co.za</a>				
TELEPHONE NUMBER	<b>012 422 2855 / 012 422 2980</b>				
<b>SUPPLIER INFORMATION</b>					
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
ARE YOU THE ACCREDITED REPRESENTATI VE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?		<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)? ☐ YES  
☐ NO

DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES  
☐ NO

DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES  
☐ NO

IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES  
☐ 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 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.: **FSCA2023/24-T014**

 CLOSING TIME **11:00**

 CLOSING DATE: **30 JANUARY 2024**

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

## 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 interest<sup>1</sup> 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

<sup>1</sup> 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**

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 consortium<sup>2</sup> 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

<sup>2</sup> 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.

ISSUE DATE	Wednesday, 13 December 2023			PAGE 38 OF 44
	TITLE	TOR FSCA202324-T014 DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA	INITIAL HERE ➔	BIDDER'S INITIALS

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 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

## Standard Bidding Documents (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); and the applicable preference point system for this tender is the 80/20 preference point system.

- 1.2 Points for this tender shall be awarded for: Price; and Specific Goals.

- 1.3 The maximum points for this tender are allocated as follows:

	POINTS
<b>PRICE</b>	<b>80</b>
<b>SPECIFIC GOALS</b>	<b>20</b>
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

- 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.

#### 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:

##### 80/20

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

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:


**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) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women ownership of 51% or more of the enterprise shareholding	10	
Youth has/have ownership of 51% or more of the enterprise shareholding	10	
<b>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 BBBEE Certificates/sworn affidavits, CIPC etc. is attached. Failure to submit the acceptable verifiable proof will result in an allocation of 0 points.</b>		

**DECLARATION WITH REGARD TO COMPANY/FIRM**

- 4.2. Name of company/firm.....
- 4.3. Company registration number:  
.....
- 4.4. 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]
- 4.5. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that 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.

ISSUE DATE	Wednesday, 13 December 2023			PAGE 42 OF 44
	TITLE	TOR FSCA202324-T014 DESIGN AND LAYOUT OF TRANSLATED RESOURCES FOR THE FSCA	INITIAL HERE ➔	BIDDER'S INITIALS

.....  
**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		Two (2) printed copies (One (1) original copy and One (1) copy of original submitted?)	
			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