



NAME OF BID	PROCURE, BRAND, REBRAND, PRINT, COLLATE, PACKAGE AND DELIVER THE MYMONEY LEARNING SERIES FACILITATOR GUIDES AND DELEGATE RESOURCES TO THE FSCA
BID NO.	FSCA2021/22-T009
CLOSING DATE	14 DECEMBER 2021
CLOSING TIME	11h00 (South African Standard Time, obtained from Telkom SA SOC Limited by dialling 1026)

BIDDER NAME			
ID/REGISTRATION NUMBER			
CSD NUMBER			
B-BBEE LEVEL		EXPIRY DATE	
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



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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 procure, brand, rebrand, print, collate, package and deliver the MyMoney Learning Series facilitator guides and delegate resources to the FSCA. The contract will commence on 1 June 2022 or earlier.
- 1.6 This bid is subject to the Preferential Procurement Policy Framework Act No. 5 of 2000 and the Preferential Procurement Regulations, 2017, Broad-Based Black Economic Empowerment Act, the General Conditions of Contract (GCC) and, if applicable, any other special conditions of contract. Where, however, the special conditions of contract conflict with the general conditions of contract, the special conditions of contract prevail.

2. Briefing session

- 2.1 A non-compulsory briefing session will be held on 24 November 2021 at 10h00 for a maximum of 2 hours via Microsoft Teams. The link to the meeting will be provided on the FSCA website.

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- 2.2 THE FSCA WILL NOT BE COMPELLED TO REPEAT ANY ISSUES ALREADY COVERED TO LATECOMERS, NOR OPEN THE BRIEFING SESSION REGISTER ONCE THE SESSION IS CONCLUDED AND THE REGISTER CLOSED.

3. Sample viewing

- 3.1 Service providers will be allowed to view the samples at the FSCA offices during the week between 10:00 to 15:00 from 26 November 2021 to 01 December 2021.
- 3.2 Service providers are required to book a viewing slot for (15 minutes) by emailing tenders@fsc.co.za.

4. Bid enquiries and questions

- 4.1 Enquiries relating to minor administrative issues with reference to the bid may be directed to:
- Jessie Myanga / Nobusi Mazwai
Supply Chain Management Unit
Tel no.: (012) 422 2855 / 012 367 7847
E-mail: tenders@fsc.co.za
- 4.2 All questions relating to the contents of the bid (conditions, rules, terms of reference etc.) must be forwarded in writing via email to tenders@fsc.co.za by not later than 02 December 2021. Questions received after this date will not be entertained.
- 4.3 All questions must reference specific paragraph numbers, where applicable.
- 4.4 All enquiries (received on or before the closing date for enquiries) will be consolidated and the FSCA will publish one response document on the FSCA website (www.fsc.co.za) within three (3) working days after the date in indicated in paragraph 4.2.
- 4.5 No requests for information shall be made to any other person or place and in particular not to the existing provider of this service.

5. Bid submission

- 5.1 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.

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

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- 5.3 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 5.2.
- 5.4 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

- 5.5 Bid documents may also be posted (preferably by registered mail) to:
- PO Box 35655
Menlo Park
Pretoria
0102
- 5.6 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.
- 5.7 **Late submissions will not be accepted.**
- 5.8 Bidders must initial each page of the bid document on the bottom right hand corner.

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6. Pricing schedule

- 6.1 Only fixed prices will be accepted.
- 6.2 A pricing schedule must be submitted on a separate sheet from the technical proposal for ease of evaluation. The pricing schedule must be submitted adjacent to the SBD3.1 form in the bid proposal.

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B. DEFINITIONS

7. Definitions

7.1 Unless inconsistent with or expressly indicated otherwise by the context.

7.1.1 **FSCA** shall mean the Financial Sector Conduct Authority or any successor in title.

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

7.1.3 **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.

7.1.4 **Service** shall mean the procurement, branding, rebranding, printing, collation, packaging and delivery of the MyMoney Learning Series facilitator guides and delegate resources to the FSCA.

7.1.5 **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.

7.2 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

8. Capabilities and experience of bidders

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

9. Form of bid

- 9.1 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.
- 9.2 **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
- 9.3 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.

10. Signing of bid

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

11. Bid all inclusive

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

12. Alterations to bid documents

- 12.1 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.

13. Qualifications on bid

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

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14. FSCA'S rights

- 14.1 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.
- 14.2 The FSCA reserves the right not to accept the lowest priced bid or any bid in part or in whole.
- 14.3 The FSCA reserves the right to award this bid as a whole or in part.
- 14.4 The FSCA reserves the right to conduct site visits at bidder's corporate offices and/or at client sites if so required.
- 14.5 The FSCA reserves the right to consider the guidelines and prescribed hourly remuneration rates for consultants as provided in the National Treasury Instruction Note 02 of 2016/2017: Cost Containment Measures, where relevant.
- 14.6 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.

15. Undertaking by bidder

- 15.1 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.
- 15.2 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.
- 15.3 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

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acceptance shall be subject to the terms and conditions contained in this bid document read with the bid.

- 15.4 The bidder furthermore confirms that they have satisfied themselves as to the correctness and validity of their bid response; that the price(s) and rate(s) quoted cover all the work/item(s) specified in the bid response documents; and that the price(s) and rate(s) cover all their obligations under a resulting contract for the services contemplated in this bid; and that they accept that any mistakes regarding price(s) and calculations will be at their risk.
- 15.5 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.
- 15.6 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.

16. Central supplier database

- 16.1 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 4 of 2016/2017.
- 16.2 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.

17. Supplier performance management

- 17.1 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.
- 17.2 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.

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- 17.3 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.

18. Cancellation of contract

- 18.1 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:

- 18.1.1 is executing a contract with the FSCA unsatisfactorily,
- 18.1.2 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,
- 18.1.3 has acted in bad faith, in a fraudulent manner or committed an offence in obtaining or executing a contract,
- 18.1.4 has in any manner influenced or attempted to influence the awarding of an FSCA's bid,
- 18.1.5 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,
- 18.1.6 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,
- 18.1.7 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 favorably considered for a period, as prescribed by the National Treasury.

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

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19. Applicable laws

- 19.1 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.
- 19.2 Each bidder shall accept the jurisdiction of the courts of the Republic of South Africa.

20. Reasons for disqualification of bid

- 20.1 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:
- 20.1.1 bidders who submit incomplete information and documentation as specified in the requirements of this bid document;
 - 20.1.2 bidders who submit information that is fraudulent, factually untrue or inaccurate;
 - 20.1.3 bidders who receive information not available to other potential bidders through any means;
 - 20.1.4 bidders who do not comply with mandatory requirements, if stipulated in the bid document;
 - 20.1.5 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
 - 20.1.6 bidders who fail to comply with FICA (Financial Intelligence Centre Act) requirements (where applicable).

21. Delegation of authority

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

22. Bid rules are binding

- 22.1 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.

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23. Language of contract

- 23.1 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

24. Objectives

24.1 The broad objectives of this bid include:

23.1.1 To provide prospective service providers with adequate information to understand and respond to the FSCA's requirements for the appointment of a service provider to procure, brand, rebrand, print, collate, package and deliver the MyMoney Learning Series facilitator guides and delegate resources to the FSCA.

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

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

25. Background

25.1 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 oversees the implementation of many consumer financial education projects and distributes a variety of printed resources to customers of financial products and services.

25.2 In 2019, the FSCA developed the FSCA's MyMoney Learning Series: a facilitated training programme that uses picture-based, conversational learning techniques to disseminate basic consumer financial education content to consumers.

25.3 The series makes use of creative executions of content which aid comprehension and retention of the information. The information is bite-sized and uses plain language principles to explain complex financial concepts.

25.4 The series consists of facilitation tools and delegate resources. Each kit consists of:

25.4.1 A portable black custom waterproof heavy-duty bag with wheels;

25.4.2 A poster tube;

25.4.3 School case;

25.4.4 8x A7 Card boxes;

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- 25.4.5 Facilitator guide;
- 25.4.6 More about file;
- 25.4.7 Blind collateral file;
- 25.4.8 Various environmental maps;
- 25.4.9 Various sized posters;
- 25.4.10 Various business card sized z-cards;
- 25.4.11 Various A4 Window cards with centre di-cut;
- 25.4.12 Various A5 Pamphlets and A5 Booklets;
- 25.4.13 1x Board game; and
- 25.4.14 Various A7 activity cards.

26. Purpose of the request for bid

- 26.1 The purpose of this bid is to appoint a contractor to procure, brand, rebrand, print, collate, package and deliver the MyMoney Learning Series facilitator guides and delegate resources to the FSCA.

27. Scope of work

- 27.1 The contractor will be required to:
 - 27.1.1 Procure items as listed in Annexure 1. Sample items are available for reference and some images of these items are included in the table.
 - 27.1.2 Brand the procured items as specified in Annexure 2. The FSCA MyMoney Learning Series style guide and the FSCA's corporate identity will be provided to the successful contractor.
 - 27.1.3 Rebrand items as listed and provided to the successful contractor in Annexure 3. Artwork for the rebranding will be provided in high-resolution.
 - 27.1.4 Print items as required in Annexures 4 to 29. Artwork will be provided for these items.
 - 27.1.5 Collate all procured, branded, rebranded, and printed items as per the collation instructions from Annexures 30 and 33.

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	TITLE	FSCA202122-T009 [PROCURE BRAND REBRAND PRINT COLLATE PACKAGE AND DELIVER RESOURCES TO THE FSCA]	INITIAL HERE →	BIDDER'S INITIALS

FSCA2021/22-T009	 Financial Sector Conduct Authority
PROCURE, BRAND, REBRAND, PRINT, COLLATE, PACKAGE AND DELIVER THE MYMONEY LEARNING SERIES FACILITATOR GUIDES AND DELEGATE RESOURCES TO THE FSCA	

27.1.6 Package the above as mentioned in 27.1.1 - 27.1.5 as per the specifications in Annexure 34.

27.1.7 Work closely with the FSCA to develop a project delivery plan.

27.1.8 Attend meetings at the FSCA's offices or online as and when required.

27.2 Deliver all items to the FSCA offices at the following address:

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

28. Bid conditions

28.1 It is mandatory for all bidders to complete the attached SBD 6.2 below. Bidders shall take note of the relevant designated sector for local content and comply with the minimum thresholds.

28.2 Guidance on the Calculation of Local Content together with Local Content Declaration Templates (Annex C, D and E) is accessible on http://www.thedti.gov.za/industrial_development/ip.jsp. Bidders should first complete Declaration D. After completing Declaration D, bidders should complete Declaration E and then consolidate the information on Declaration C. **Declaration C should be submitted with the bid documentation at the closing date and time of the bid in order to substantiate the declaration made in paragraph (c) below.** Declarations D and E should be kept by the bidders for verification purposes for a period of at least 5 years. The successful bidder is required to continuously update Declarations C, D and E with the actual values for the duration of the contract.

28.2.1 Where applicable, only locally produced goods or locally manufactured goods must be considered.

28.2.2 Meeting the stipulated minimum threshold for local production and content will be mandatory.

28.3 The following special conditions are applicable to this bid:

28.3.1 Colour saturation must be consistent throughout the print-run, i.e. consistency of the last print batches must be the same as the first print batch. Resources with faded or washed-out colours inconsistent with the approved print proofs will not be accepted by the FSCA.

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PROCURE, BRAND, REBRAND, PRINT, COLLATE, PACKAGE AND DELIVER THE MYMONEY LEARNING SERIES FACILITATOR GUIDES AND DELEGATE RESOURCES TO THE FSCA	

- 28.3.2 Provide the FSCA with one (1) printed mockup of each printing element for sign-off, before mass print. No signature – No printing.
- 28.3.3 Must ensure availability of adequate staff and resources to implement this project. This is inclusive of staff that can collate and package the FSCA's MyMoney Learning Series.
- 28.3.4 Allow for three (3) rounds of amendments on each resource if required by the FSCA. Spelling and grammatical changes will not be considered an amendment.
- 28.3.5 The FSCA reserves the right not to accept any damaged materials. Damaged materials will be returned to the contractor to be replaced at no additional cost to the FSCA.
- 28.3.6 All material printed for the FSCA, including the intellectual property of any design and layout, shall remain the sole property of the FSCA.
- 28.3.7 The delivery deadline will be as per the project timeline agreed upon between the FSCA and the successful contractor.
- 28.4 Failure to comply in terms of the above-mentioned set bid conditions will result in disqualification.

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	TITLE	FSCA202122-T009 [PROCURE BRAND REBRAND PRINT COLLATE PACKAGE AND DELIVER RESOURCES TO THE FSCA]	INITIAL HERE →	BIDDER'S INITIALS

FSCA2021/22-T009	
PROCURE, BRAND, REBRAND, PRINT, COLLATE, PACKAGE AND DELIVER THE MYMONEY LEARNING SERIES FACILITATOR GUIDES AND DELEGATE RESOURCES TO THE FSCA	

29. Bid evaluation

29.1 The proposals will be evaluated as follows.

29.1.1 Evaluation Stage One: Compliance

Compliance with administrative requirements stated in the Standard Bidding Documents and the mandatory requirements as listed in paragraph 32 below. In this evaluation stage, all bidders that fail to provide the required information and documentation, will be disqualified from further evaluation.

29.1.2 Evaluation Stage Two: Functional evaluation (Desktop evaluation)

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

29.1.3 Evaluation Stage Three: Preference Point System

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

29.1.4 Evaluation Stage Four: Site Inspection

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

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30. Functional evaluation (Desktop)

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

30.1.1 Values: 0=Poor 1=Below average, 2=Average, 3=Good, 4=Very Good, 5=Excellent

Table 1

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
A. Samples	A.1. Provide images of samples of material (promotional items/resources in various formats) that have been printed and branded/rebranded via electronic link/website as required in Annexures 1-3.	A.1.1. No images of samples of printed, branded and rebranded material are provided in alignment with the requirements for this tender.	0	30
		A.1.2. Less than three images of samples of printed, branded and rebranded material are provided in alignment with the requirements for this tender.	1-2	
		A.1.3. Three or more images of samples of printed, branded and rebranded material are provided in alignment with the requirements for this tender.	3-5	
		B.1.1. No business profile provided.	0	40

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
B. Organisational profile and references letters	B.1. Provide a business profile which includes an overview of the company, its services, promotional items and a list of staff committed to the project (casual or permanent) and their expertise.	B.1.2. Business profile provided includes an overview of the company, its services, promotional items and a list of staff (casual or permanent) and their expertise. Bidder has less than three years' experience in providing similar services as per the requirements of this tender.	1-2	
		B.1.3. Business profile provided includes an overview of the company, its services, promotional items and a list of staff (casual or permanent) and their expertise. Bidder has three or more years' experience in providing similar services as per the requirements of this tender.	3-5	

ITEM	DESCRIPTION	DETAILED DESCRIPTION	RATING	WEIGHT
	B.2. Bidders must submit contactable references that are in alignment with the requirements for this tender. The information must include name of the client, client contact details, year of work done, and the nature of work done for the client.	B.2.1. No list of contactable client references submitted which is in alignment with the requirements for this tender.	0	30
		B.2.2. One to three contactable client references submitted which is in alignment with the requirements for this tender.	1-2	
		B.2.3. Four or more contactable client references submitted which is in alignment with the requirements for this tender.	3-5	
Total				100

31. Preference point system

- 31.1 The formula below will be used to calculate the preference procurement points for price:

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

- 31.2 Where

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid or offer under consideration

Pmin = Comparative price of lowest acceptable bid

- 31.3 Depending on the bidder's level of broad-based black empowerment contribution, a maximum of 20 points may be allocated to a bidder. The points scored by a bidder for broad-based black economic empowerment contribution will be added to the preference procurement points allocated for price.
- 31.4 The table below reflects the number of points to be allocated to a bidder based on broad-based black economic empowerment contribution:

Table 2

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- 31.5 Bidders are required to submit proof of B-BBEE Status Level of contributor. Proof includes valid B-BBEE Status Level Verification Certificates or certified copies of sworn affidavits together with their bidders or price quotations, to substantiate their B-BBEE rating claims

- 31.6 Bidders who did not submit their B-BBEE Status Level Verification Certificates/certified copies of sworn affidavits or who are non-compliant contributors to B-BBEE do not qualify for preference points for B-BBEE but should not be disqualified from the bidding process unless if the FSCA has stipulated a specific B-BBEE Status Level as pre-qualification criteria in terms of Regulation 4; and the bidder does not meet this requirement. In this instance, the FSCA must disqualify such bidder as having submitted an unacceptable bid.
- 31.7 A consortium or joint venture (including unincorporated consortia and joint ventures) must submit a consolidated B-BBEE Status Level Verification Certificate for every separate bid
- 31.8 Bidders must ensure that their B-BBEE Status Level Verification Certificates submitted are issued by the following agencies:
- 31.8.1 Bidders who qualify as Exempted Micro Enterprise (EMEs):
- 31.8.1.1 Verification agencies accredited by SANAS; or
- 31.8.1.2 Sworn affidavit signed by the EME representative and attested by a Commissioner of oaths.

32. Standard bidding documents

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

Table 3

Invitation to bid	SBD 1
Pricing Schedule	SBD 3.1
Declaration of Interest	SBD 4
Preference Points Claim Form for Preferential Procurement Regulations 2017 (including a valid B-BBEE Status Level Verification Certificate) Should a bidder not complete and sign the SBD 6.1, the bidder will be allocated 0.00 points for B-BBEE.	SBD 6.1
Declaration Certificate for Local Production and Content For. Designated Sectors	SBD 6.2
Declaration: Abuse of Supply Chain Management Systems	SBD 8
Certificate of Independent Bid Determination	SBD 9

33. Timeline of the bid process

33.1 The period of validity of the bid and the withdrawal of offers, after the closing date and time are 120 days, expiring on 14 April 2022. The project timeframes of this bid are set out below:

Table 4

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
1.	Advertisement of bid on Government e-tender portal / print media / Tender Bulletin	16 November 2021
2.	Briefing session	24 November 2021
3.	Sample Viewing	26 – 30 November 2021
4.	Questions relating to bid from bidder(s)	02 December 2021
5.	Bid closing date	14 December 2021
6.	Compliance: Bid Evaluation Committee	11 January 2022
7.	Functional Evaluation: (Desktop evaluation)	18 January 2022
8.	Preference Point System: Bid Evaluation Committee	25 January 2021
9.	Bid Adjudication: Bid Adjudication Committee	3 February 2022

STAGE	DESCRIPTION OF STAGE	ESTIMATED COMPLETION DATE (OR WORK WEEK ENDING)
10.	Notification of the outcome to the bidders	10 February 2022

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

33.3 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 1: ITEMS TO BE PROCURED**

1. Table 1 below lists the items to be procured.

Table 1

NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
1.	Treeline: Lever arch file with front, inner and spine pocket Size: A4, 315x285x40mm Colour: Black Quality: Thick, welded PVC file. As per sample provided.	20	
2.	Treeline: Lever arch file with front, inner and spine pocket Size: A4, 315x285x40mm Colour: Red Quality: Thick, welded PVC file. As per sample provided.	10	

NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
3.	School case Size: A3 or 420x320x135mm. Colour: Black with one black fold down handle and two hinged locks in black as well. Quality: Tough moulded polypropylene. As per sample provided.	5	
4.	A7 Card box, black Flush lid box. Each box has the capacity to hold 120 x A6 cards (220GSM). Size: 116(L) x 66(W) x 82(h)mm Colour: Black Quality: Durable, reusable base and lid covered in black wibalin. As per sample provided.	40	
5.	Plastic Tokens/Coin Size of token: 29mm diameter/Thickness: R5 coin Colour: Black Quality: Durable, reusable. No sample provided.	400	

NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
6.	Plastic, durable, reusable/resealable bags. (NOT ZIPLOCK) Size: Medium - 20x20cm. Must be able to fit 20 tokens in one bag as per no.5 above. Colour: Clear Quality: Food grade Polyethylene Vinyl Acetate (PEVA) material. Sturdy double watertight sip-lock seal. Leak-proof. Eco friendly product. No sample provided.	20	
7.	Expandable drawing poster tube Description: Durable plastic telescopic blueprint document painting paper storage tube with extendable telescopic mechanism and screw cap. With adjustable and removable woven shoulder strap. Size: Diameter of tube 10.79cm, expandable length 76-115cm, 14 lock increments. Colour: Black tube and strap Quality: Strong, durable, black plastic. Water and moisture resistant. As per sample provided.	5	

NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
8.	Kit bags Description: Customised, durable, black bag with wheels and carry straps. Different sized compartments with velcro to fit all the printing elements from the FSCA's MyMoney Learning Series. The bag must have a hard body which is covered by a canvas material which is durable, brandable and waterproof. Size: Length:96cm, Height:30cm, Breath: 52cm, Width:41cm Colour: Black bag, black straps and black wheels. Quality: As per the sample provided. Previous service provider of bags: Trainiac (Pty) Ltd 	5	

ANNEXURE 2: ITEMS TO BE BRANDED

2. Table 2 below lists the items to be branded.

Table 2

NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
1.	School case Branding 1: One position print, full colour, FSCA MyMoney learning series logo in the centre directly onto the bag (no sticker). Size of branding: 159x78mm  Branding 2: FSCA logo in one colour (white) directly onto the bag. Bottom RIGHT HAND SIDE corner. Size of branding: 100x80mm  Branding 3: Print a number in white, one position onto the right hand side of the bags. (numbers 1, 2, 3 ,4 & 5). Font: Arial Bold Size of branding: 25x20mm	5	

NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
2.	A7 Card boxes Branding: Design and brand each box on the top lid with a list of the contents that can be found in the box. The service provider must brand directly onto the top lid of the box. Copy will be provided by the FSCA. Size of branding: 110x 60mm In total there are 20 kit bags. Each kit bag contains 8 boxes. Type: There are 8 different types of labels. Each label has different copy. i.e. Label 1 x20, Label 2 x20, Label 3 x20, Label 4 x20, Label 5 x20, Label 6 x20, Label 7 x20 and Label 8 x20	160 labels	
3.	Expandable drawing poster tube Branding: Durable, circular sticker for the top of the poster tube (poster lid). Full colour, FSCA MyMoney Learning Series logo, one position print. Artwork will be provided by the FSCA. Add URL www.fscamymoney.co.za  Size of branding: Size of license disk sticker, circular, 90x90mm Note: the sticker must be permanent and must not fall/peel off.	5	

NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
4.	Kit bags Branding 1: Embroider, one position print, FSCA MyMoney Learning Series Logo in the middle of the bag. Colour: Full colour Size of branding: 200mmx150mm. Refer to sample provided. Branding 2: Embroider the FSCA logo on the bottom RIGHT-HAND side of each bag. Colour: White Size of branding: 200mmx150mm Branding 3: Add embroidered numbers in white, one position onto the bags. (numbers 16-20). Location of the print position will be confirmed with the successful contractor. Colour: White Size of number: 80x80mm.	5	 

ANNEXURE 3: ITEMS TO BE REBRANDED

3. The following items as listed in table 3 below will be provided to the contractor by the FSCA for rebranding as per the instructions below.

Table 3

NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
1.	School case Branding to be removed: Remove the sticker in the center and the white logo on the front of the bag in the RIGHT-HAND side corner. Rebranding 1: One position print, FSCA MyMoney Learning Series in the centre and directly onto the bag (no sticker). Colour: Full colour Size of branding: 159x78mm Rebranding 2: FSCA logo directly onto the bag. Bottom RIGHT HAND SIDE corner. Colour: White Size of branding: 100x80mm Rebranding 3: Print a number one position onto the side of the bags. (numbers 6, 7, 8, 9, 10, 11,12,13,14 &15). Colour: White Size of branding: to be confirmed with the successful contractor.	5	

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NO.	DESCRIPTION	QUANTITY	SAMPLE IMAGE
2.	Kit bag Additional branding 1: Embroider the FSCA logo on the bottom RIGHT-HAND side of each bag. Colour: White Size of branding: 200mmx150mm Additional branding 2: Add embroidered numbers in one position onto the bags. (numbers 1-15). Location of the print position will be confirmed with the successful contractor. Colour: White Size of number: 80x80mm. Note: Do not mix up or misplace the contents of the kit bags during the branding process.	15	

ANNEXURE 4: FACILITATOR GUIDE (FG) FILE CONTENTS

4. Printing specification of items listed below should be as follows:

- 4.1 Paper: A4, 135 GSM Galerie (Silk), white. Printed back-to-back in full colour.
- 4.2 Finishing: Holes drilled (punched), trimmed to size.
- 4.3 Quantity: 20 x Copies of each item listed.

Table 4

NO.	ITEMS TO BE PRINTED	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED
1.	Executive summary FSCA MyMoney Learning Series (Note: Word document not PDF)	7	140
2.	FSCA – Analysis and insight (Note: Word document not PDF)	69	1380
3.	Learning series introduction	42	840
4.	Icebreakers	11	220
5.	Life experiences	3	60
6.	Save for unexpected expenses	2	40
7.	Interest	2	40
8.	How to budget	4	80
9.	Be in control of your finances	3	60
10.	Social grants	3	60
11.	Financial advisors	3	60
12.	Financial plans	2	40
13.	Getting financial advice	3	60
14.	Savings vs investments	1	20
15.	Informal savings	2	40
16.	Banking products	2	40
17.	Understanding investments	4	80
18.	Making a financial or investment decision	1	20
19.	Fixed and variable interest investment	3	60
20.	Planning for retirement	2	40
21.	Claim unclaimed pension fund benefits	2	40
22.	Digital currency	2	40
23.	Short and long term insurance	5	100
24.	Safeguard your finances	3	60
25.	Scams	2	40
26.	Financial stress	3	60
27.	Last will and testament	3	60

NO.	ITEMS TO BE PRINTED	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED
28.	Payments	2	40
29.	Bank accounts	1	20
30.	Currencies	1	20
31.	Payslips	2	40
32.	Tax	2	40
33.	Statements and bills	3	60
34.	Contracts	2	40
35.	Start a business	4	80
36.	Finances and business	2	40

ANNEXURE 5: ABOUT (MA) FILE CONTENTS

5. Printing specification of items listed below should be as follows:

5.1 Paper: A4, 80 GSM Galerie, white. Printed back-to-back in full colour.

5.2 Finishing: Holes drilled (punched), trimmed to size.

5.3 Quantity: 20 Copies of each item listed.

Table 5

NO.	ITEMS TO BE PRINTED	NO. OF PAGE S	TOTAL NO. OF PAGES TO BE PRINTED
1.	Financially smart glossary	3	60
2.	Financial safeguard glossary	7	140
3.	Financial protection glossary	5	100
4.	Financial knowledge glossary	3	60
5.	Business finance glossary	3	60
6.	Save for unexpected expenses	3	60
7.	Interest	2	40
8.	How to budget	8	160
9.	Be in control of your finances	6	120
10.	Social grants	10	200
11.	Financial advisors	4	80
12.	Financial plans	3	60
13.	Getting financial advice	5	100
14.	Savings vs investments	2	40
15.	Informal savings	2	40
16.	Banking products	5	100
17.	Understanding investments	6	120
18.	Making a financial or investment decision	3	60
19.	Fixed and variable interest investments	19	380
20.	Planning for retirement	8	160
21.	Claim unclaimed pension fund benefits	4	80
22.	Digital currency	3	60
23.	Short term insurance	3	60
24.	Long term insurance	4	80
25.	Safeguard your finances	9	180
26.	Scams	11	220
27.	Financial stress	8	160
28.	Last will and testament	7	140

NO.	ITEMS TO BE PRINTED	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED
29.	Payments	4	80
30.	Bank accounts	3	60
31.	Currencies	4	80
32.	Payslips	5	100
33.	Tax	3	60
34.	Statements and bills	4	80
35.	Contracts	6	120
36.	Start a business	15	300
37.	Finance and business	10	200

ANNEXURE 6: BLIND COLLATERAL (BC) FACILITATOR GUIDE CONTENTS

6. Printing specification of items listed below should be as follows:

6.1 Paper: A4, 135 GSM Galerie (Silk), white. Printed back-to-back in full colour.

6.2 Finishing: Holes drilled (punched), trimmed to size.

6.3 Quantity: 20 Copies of each item listed.

Table 6

NO.	ITEMS TO BE PRINTED	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED
1.	Executive summary FSCA MyMoney Learning Series (note: word document not PDF)	7	140
2.	FSCA - Analysis and insight (note: word document not PDF)	69	1380
3.	Blind FSCA learning series introduction	37	740
4.	Icebreakers	5	100
5.	Saving for unexpected expenses	3	60
6.	Interest	2	40
7.	How to budget	6	120
8.	Be in control of your finances	4	80
9.	Social grants	4	80
10.	Financial advisors	4	80
11.	Savings vs investments	2	40
12.	Fixed and variable interest investments	3	60
13.	Short and long-term insurance	7	140
14.	Planning for retirement ma	4	80
15.	Claim unclaimed pension fund benefits	3	60
16.	Last will and testament	3	60
17.	Finance and business	2	40

ANNEXURE 7: BLIND COLLATERAL (BC) – DELEGATE RESOURCES

7. Printing specification of items listed below should be as follows:

7.1 Paper: A4, 80 GSM Galerie (Silk), white. Printed back-to-back in full colour.

7.2 Finishing: Holes drilled (punched), trimmed to size.

7.3 Quantity: 20 Copies of each item listed.

7.4 Note: These are Microsoft Word files with no design and layout.

Table 7

NO.	ITEMS TO BE PRINTED	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED
1.	Saving for unexpected expenses	2	40
2.	Interest	3	60
3.	How to budget	3	60
4.	Be in control of your finances	3	60
5.	Social grants	12	240
6.	Financial advisors	3	60
7.	Savings vs investments	1	20
8.	Fixed and variable interest investments	13	260
9.	Short and long term insurance	9	180
10.	Planning for retirement ma	5	100
11.	Claim unclaimed pension fund benefits	2	40
12.	Last will and testament	5	100
13.	Finance and business	5	100

ANNEXURE 8: FACILITATOR GUIDE (FG) FILE TABS

8. Printing specification of items listed below should be as follows:

- 8.1 Paper: A4, 350 GSM Galerie (Silk), white. Printed back-to-back in full colour.
- 8.2 Size: 247mmx322mm
- 8.3 Finishing: Trimmed to size, Matt lam both sides, Tab cut dividers, punched holes.
- 8.4 Quantity: 20 Copies of each item listed.

Table 8

NO	ITEMS TO BE PRINTED	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED	SAMPLE IMAGE
1.	My notes	1	20	
2.	Facilitator guidelines	1	20	
3.	Ice breakers and energisers	1	20	
4.	Life experiences	1	20	
5.	Financially smart	1	20	
6.	Financial safeguard	1	20	
7.	Financial protection	1	20	
8.	Financial knowledge	1	20	
9.	Business finance	1	20	

ANNEXURE 9: MORE ABOUT (MA) FILE TABS

9. Printing specification of items listed below should be as follows:

9.1 Paper: A4, 350 GSM Galerie (Silk), white. Printed back-to-back in full colour.

9.2 Size: 247mmx322mm.

9.3 Finishing: Trimmed to size, Matt lam both sides, Tab cut dividers, punched holes.

9.4 Quantity: 20 Copies of each item listed.

Table 9

NO.	ITEMS TO PRINT	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED
1.	Glossary	1	20
2.	Financially smart	1	20
3.	Financial safeguard	1	20
4.	Financial protection	1	20
5.	Financial knowledge	1	20
6.	Business finance	1	20

ANNEXURE 10: BLIND COLLATERAL (BC) FILE TABS

10. Printing specification of items listed below should be as follows:

10.1 Paper: A4, 350 GSM Galerie (Silk), white. Printed back-to-back in full colour.

10.2 Size: 247mmx322mm

10.3 Finishing: Trimmed to size, Matt lam both sides, Tab cut dividers, punched holes.

10.4 Quantity: 20 Copies of each item listed.

Table 10

NO.	ITEMS TO PRINT	NO. OF PAGES	TOTAL NO. OF PAGES
1.	My notes	1	20
2.	Facilitator guidelines	1	20
3.	Ice breakers and energisers	1	20
4.	Financially smart	1	20
5.	Financial safeguard	1	20
6.	Financial protection	1	20
7.	Business finance	1	20

ANNEXURE 11: BLIND COLLATERAL (BC) FILE COVER AND FILE SPINE

11. Printing specification of items listed below should be as follows:

11.1 Paper: A4, 350 GSM Galerie (Silk), white. Printed single sided in full colour.

11.2 Finishing: Trimmed to size

11.3 Size of cover: 250x305mm

11.4 Size of spine: 30x305mm

11.5 Quantity: 20 Copies of each item listed.

Table 11

NO.	ITEMS TO PRINT	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED	SAMPLE IMAGE OF FILE COVER AND SPINE
1.	Facilitator guide for blind and partially-sighted file cover	1	20	
2.	Blind and partially-sighted file spine	1	20	

ANNEXURE 12: FACILITATOR GUIDE AND MORE ABOUT FILE COVER AND FILE SPINE

12. Printing specification of items listed below should be as follows:

12.1 Paper: A4, 350 GSM Galerie (Silk), white. Printed single sided in full colour.

12.2 Finishing: Trimmed to size

12.3 Size of cover: 250x305mm

12.4 Size of spine: 30x305mm

12.5 Quantity: 5 Copies of each item listed.

Table 12

NO.	ITEMS TO PRINT	NO. OF PAGES	TOTAL NO. OF PAGES TO BE PRINTED
1.	Facilitator guide cover	1	5
2.	Spine for facilitator guide	1	5
3.	More about cover	1	5
4.	Spine for more about file	1	5

ANNEXURE 13: BLIND COLLATERAL (BC) CARDS WITH HOLES

13. Printing specification of items listed below should be as follows:

13.1 Paper: A7, 350 GSM Galerie (Silk), white.

13.2 Finishing: Trimmed to size matt laminated on both sides.

13.3 Quantity: As listed.

13.4 Packaging: Each set should be collated and secured with an elastic band.

Table 17

NO.	ITEMS TO PRINT	VARIETY	TOTAL NO. OF CARDS TO BE PRINTED
1.	Money cards with one hole Quantity per kit: 120 cards x20 kits=2400 in total	1	2400
2.	Money cards with two holes Quantity per kit: 80 cards x20 kits=1600 in total	1	1600
3.	Money cards with three holes Quantity per kit: 160 cards x20 kits=3200 in total	1	3200

ANNEXURE 14: BOOKLETS

14. Printing specification of items listed below should be as follows:

14.1 Size: A5

14.2 Cover: 300 GSM Galerie (silk), printed back-to-back in full colour, white

14.3 Inside: 135 GSM Galerie (silk), printed back-to-back in full colour, white

14.4 Finishing: Matt lam – cover only, Saddle stitched and trimmed to size.

14.5 Quantity: As listed.

Table 14

NO.	ITEMS TO PRINT	NO. OF PAGES PER BOOK	QUANTITY
1.	Life experiences booklet	40	5000
2.	Interest booklet	12	5000
3.	How to budget booklet	20	7500
4.	Be in control of your finances Booklet	16	7500
5.	Social grants booklet	32	7500
6.	Financial advisors booklet	16	7500
7.	Getting financial advice booklet	16	7500
8.	Banking products booklet	16	7500
9.	Understanding investment booklet	16	7500
10.	Variable investments booklet	24	7500
11.	Planning for retirement booklet	20	7500
12.	Short and long term insurance booklet	28	7500
13.	Safeguard your finances booklet	16	7500
14.	Scams booklet	32	7500
15.	Financial stress booklet	16	5000
16.	Last will and testament booklet	16	7500
17.	Start a business booklet	32	7500
18.	Finances and business booklet	20	7500

ANNEXURE 15: Z-CARDS

15. Printing specification of items listed below should be as follows:

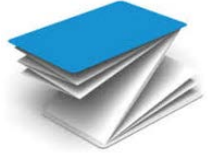
15.1 Size - Cover: 78mm x 108mm.

15.2 Size - Insert: 297mm x 240mm

15.3 Paper: Cover: 300 GSM, single sided full colour. Insert: 70 GSM, double sided full colour

15.4 Quantity: 5000 copies of each item listed.

Table 15

NO.	ITEMS TO PRINT	NO. OF PAGES	QUANTITY	SAMPLE IMAGE
1.	Z-card saving for unexpected events	1	5000	 
2.	Z-card steps to create a financial plan	1	5000	
3.	Z-card making a financial decision	1	5000	
4.	Z-card claim unclaimed pension fund benefits	1	5000	
5.	Z-card payment	1	5000	
6.	Z-card bank accounts	1	5000	
7.	Z-card payslips	1	5000	
8.	Z-card statement and bills	1	5000	

ANNEXURE 16: PAMPHLETS

16. Printing specification of items listed below should be as follows:

16.1 Size: A5

16.2 Paper: Galerie (silk)100 GSM. Printed back and front in full colour.

16.3 Finishing: Matt laminated both sides, Trimmed to size.

16.4 Quantity: As listed.

Table 16

NO.	ITEMS TO BE PRINTED	NO. OF PAGE S	QUAN TITY	SAMPLE IMAGE
1.	Savings vs investments pamphlet	1	7500	
2.	Informal savings pamphlet	1	7500	
3.	Fixed interest pamphlet	1	7500	
4.	Currencies pamphlet	1	5000	
5.	Contracts pamphlet	1	5000	
6.	TAX PAMPHLET (note that this is an A4 folded to A5)	1	5000	
7.	Digital currency gatefold pamphlet (note that this is a gatefold pamphlet a4 folded to a5) See sample image.	1	5000	

ANNEXURE 17: A4 WINDOW CARDS

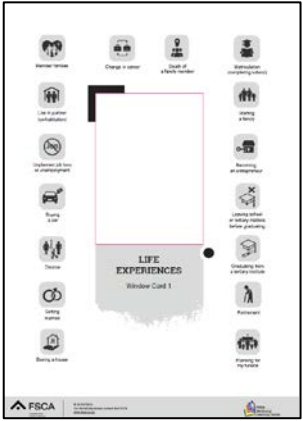
17. Printing specification of items listed below should be as follows:

17.1 Paper: A4, Galerie (silk) 350 GSM, printed full colour on one side, white.

17.2 Finishing: Matt lam on both sides, trim to size, die-cut window A7 in size.

17.3 Quantity: 4 per kit. i.e. There will be one set of 4 of each title window card per kit bag. 4 window cards x 20 kit bags = 80 copies of each.

Table 17

NO.	ITEMS TO PRINT	NO. OF PAGES	NO. OF PAGES (1) X (4) SETS X (20) KITS	SAMPLE IMAGE
1.	Life experiences	1	80	
2.	Save for unexpected	1	80	
3.	How to budget	1	80	
4.	Financial advisors	1	80	
5.	Getting financial advice	1	80	
6.	Informal savings	1	80	
7.	Fixed interest investment products	1	80	
8.	Claim unclaimed pension fund benefits	1	80	
9.	Financial stress	1	80	
10.	Payments	1	80	
11.	Business finance	1	80	

ANNEXURE 18: ENVIRONMENTAL MAP

18. Printing specification of items listed below should be as follows:

18.1 Size: A0

18.2 Description: (PVC) LatFlat, 400 GSM, printed in colour one side only, back black.

18.3 Finishing: Trim to size, label the outside of the poster with the name of the environmental map.

18.4 Quantity: 4 sets per kit x 20 kits =80 copies of each map listed.

18.5 Packaging: Rolled into sets of 4 and secured with elastic band.

Table 18

NO.	ITEMS TO BE PRINTED	VARIETY	QUANTITY= VARIETY (1) X (4) SETS X (20) KITS	SAMPLE IMAGE
1.	Life experiences	1	80	
2.	Financially smart	1	80	
3.	Financial safeguard	1	80	
4.	Financial protection	1	80	
5.	Financial knowledge	1	80	
6.	Business finance	1	80	

ANNEXURE 19: A0 POSTERS

19. Printing specification of items listed below should be as follows:

19.1 Size: A0

19.2 Description: (PVC) LatFlat, 400 GSM, printed in colour one side only, back black

19.3 Finishing: Trim to size, label the outside of the poster with the name of the poster.

19.4 Quantity: 4 sets per kit x 20 kits =80 copies of each poster listed.

19.5 Packaging: Rolled into sets of 4 and secured with elastic band.

Table 19

NO.	ITEMS TO BE PRINTED	VARIETY	QUANTITY= VARIETY (1) X (4) SETS X (20) KITS
1.	Currencies	1	80
2.	Everything about bank accounts	1	80
3.	Scams	1	80

ANNEXURE 20: A1 PVC POSTER

20. Printing specification of items listed below should be as follows:

20.1 Size: A1

20.2 Description: (PVC) LatFlat, 400 GSM, printed in colour one side only, back black

20.3 Finishing: Trim to size, label the outside of the poster with the name of the poster.

20.4 Quantity: 2 Posters per kit. 2 Posters x 20 kits = 40 posters.

20.5 Packaging: Rolled into sets of 2 and secured with elastic band.

Table 20

NO.	ITEM TO BE PRINTED	VARIETY	QUANTITY = VARIETY (1)X X (2) POSTERS X (20) KITS
1.	Digital currency	1	40

ANNEXURE 21: A2 PVC LIFE EXPERIENCES POSTERS

21. Printing specification of items listed below should be as follows:

21.1 Size: A2

21.2 Description: (PVC) LatFlat, 400 GSM, printed in colour one side only, back black.

21.3 Finishing: Trim to size, label the outside of the poster with the name of the environmental map.

21.4 Quantity: 1 of each variety x 20 kit bags.

21.5 Packaging: Rolled into sets of 16 posters and secured with elastic band.

Table 21

NO.	ITEMS TO BE PRINTED	VARIETY	QUANTITY= VARIETY (1) NO. X (20) KITS
1.	Education: matriculation (completing school)	1	20
2.	Education: graduation from a tertiary institute	1	20
3.	Education: leaving school or tertiary	1	20
4.	Career: change in career	1	20
5.	Career: unplanned job loss or unemployment	1	20
6.	Career: retirement	1	20
7.	Family: starting a family	1	20
8.	Relationships: blended families	1	20
9.	Relationships: getting married	1	20
10.	Relationships: live in partner (co-habitation)	1	20
11.	Relationships: divorce	1	20
12.	Big purchases: buying a car	1	20
13.	Big purchases: buying a house	1	20
14.	Starting a business: becoming an entrepreneur	1	20
15.	Death: death of a family member	1	20
16.	Death: planning for my funeral	1	20

ANNEXURE 22: A3 PVC POSTERS

22. Printing specification of items listed below should be as follows:

22.1 Size: A3

22.2 Description: (PVC) LatFlat, 400 GSM, printed in colour one side only, back black

22.3 Finishing: Trim to size, label the outside of the poster with the name of the poster.

22.4 Quantity: 4 sets per kit. 4 sets x 2 types x 20 kits = 160 in posters total.

22.5 Packaging: A and B, rolled together and secured with elastic band.

Table 22

NO.	ITEMS TO BE PRINTED	VARIETY	QUANTITY= VARIETY (1) X (4 SETS) X(20) KITS
1.	Payslip poster A	1	80
2.	Payslip poster B	1	80

ANNEXURE 23: PVC GAMEBOARD

23. Printing specification of items listed below should be as follows:

23.1 Size: 912x912mm

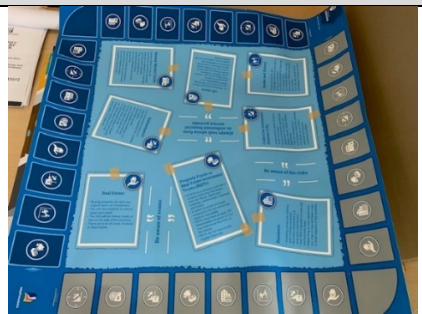
23.2 Description: (PVC) LatFlat, 400 GSM, printed in colour one side only, back black.

23.3 Finishing: Trim to size, label the outside of the boardgame with the name of the boardgame.

23.4 Quantity: 1 x per kit = 20 in total.

23.5 Packaging: Rolled and secured with elastic band.

Table 23

NO.	ITEM TO BE PRINTED	VARIETY	NO. X 20 KITS	SAMPLE IMAGE
1.	Investment game	1	20	

ANNEXURE 24: INVESTMENT GAME RULE CARD

24. Printing specification of items listed below should be as follows:

24.1 Size: A4.

24.2 Paper: Galerie (silk) 350 GSM, Full colour single sided, white.

24.3 Finishing: Trim to size, matt lam on both sides.

24.4 Quantity: 1 x per kit = 20 in total.

Table 24

NO.	ITEM TO BE PRINTED	VARIETY	NO. X 20 KITS
1.	The investment game rule card	1	20

ANNEXURE 25: A5 VARIABLE INTEREST CARDS

25. Printing specification of items listed below should be as follows:

25.1 Size: A5.

25.2 Paper: Galerie (silk) 350 GSM, Full colour single sided, white.

25.3 Finishing: Trim to size, matt lam on both sides.

25.4 Quantity: 4 sets x 8 different cards per kit bag= 32 cards per kit bag. 32 cards per kit bag x 20 kit bags = 640 in total.

Table 25

NO.	ITEM TO BE PRINTED	VARIETY	QUANTITY= VARIETY (1) X (4) SETS X (20) KITS
1.	Variable interest investment definitions card 1	1	80
2.	Variable interest investment definitions card 2	1	80
3.	Variable interest investment definitions card 3	1	80
4.	Variable interest investment definitions card 4	1	80
5.	Variable interest investment definitions card 5	1	80
6.	Variable interest investment definitions card 6	1	80
7.	Variable interest investment definitions card 7	1	80
8.	Variable interest investment definitions card 8	1	80

ANNEXURE 26: A7 CARDS

26. Printing specification of items listed below should be as follows:

26.1 Size: A7.

26.2 Paper: Galerie (silk) 350 GSM, Full colour single sided, white.

26.3 Finishing: Trim to size, matt lam on both sides.

26.4 Quantity: As listed below.

26.5 Packaging: In respective sets, secured with a temporary elastic band.

Table 26

NO.	ITEMS TO BE PRINTED	VARIETY	QUANTITY= VARIETY X(4) SETS X (20) KITS	SAMPLE IMAGE
1.	Life experience cards Quantity: 4 sets per kit. 4 Sets x 16 cards x 20 kits = 1280	16 with common back	1280	
2.	Lifestyle cards Quantity: 4 sets per kit. 4 Sets x 46 cards x 20 kits = 3680	46 with a common back	3680	
3.	Explainer cards Quantity: 4 sets per kit. 4 Sets x 12 cards x 20 kits = 960	12 with a common back	960	
4.	Explainer cards coin Quantity: 36 sets per kit. 36 Sets x 1 card x 20 kits = 720	1 with common back	720	
5.	Explainer cards money notes Quantity: 36 sets per kit. 36 Sets x	1 with common back	720	

NO.	ITEMS TO BE PRINTED	VARIETY	QUANTITY= VARIETY X(4) SETS X (20) KITS	SAMPLE IMAGE
	1 card x 20 kits = 720			
6.	Savings and investments cards Quantity: 4 sets per kit. 4 Sets x 12 cards x 20 kits = 960	12 with a common back	960	
7.	Banking products cards Quantity: 4 sets per kit. 4 Sets x 7 cards x 20 kits = 560	7 with common back	560	
8.	Investment game cards Quantity: 1 set per kit. 1 Set per kit x 38 cards x 20 = 760	38 with common back	760	
9.	Reasons for retirement cards Quantity: 4 sets per kit. 4 Sets per kit x 8 cards x 20 = 640	8 with common back	640	
10.	Insurance cards Quantity: 4 sets per kit. 4 Sets per kit x 14 cards x 20 = 1120	14 with common back	1120	
11.	Right to complain cards Quantity: 4 sets per kit. 4 Sets per kit x 10 cards x 20 = 800	10 with common back	800	

ANNEXURE 27: A4 HANDOUT

27. Printing specification of items listed below should be as follows:

27.1 Size: A4.

27.2 Paper: Galerie (silk) 100 GSM, Full colour single sided, white.

27.3 Finishing: Trim to size, matt lam on both sides.

27.4 Quantity: As listed below.

Table 27

NO.	ITEMS TO BE PRINTED	VARIETY	TOTAL HANDOUTS
1.	Statement and bills handouts Quantity per kit: 4 sets x 6 types =24 handouts Quantity to print: 24 handouts x 20 kits = 480 in total	6	480
2.	Contract handout Quantity per kit: 1 Quantity to print: 20	1	20

ANNEXURE 28: FSCA MYMONEY MATERIAL CHECKLIST

28. Printing specification of items listed below should be as follows:

28.1 Size: A4.

28.2 Paper: Galerie (silk) 350 GSM, Full colour double sided, white.

28.3 Finishing: Trim to size, matt lam on both sides.

28.4 Quantity: 2 Per kit. 2 per kit x 20 kits = 40.

Table 32

NO.	ITEM TO BE PRINTED	VARIETY	QUANTITY= VARIETY X (2) SETS X (20) KITS
1.	FSCA MyMoney material checklist	1	40

ANNEXURE 29: CARD DIVIDER

29. Printing specification of items listed below should be as follows:

29.1 Size: 105x82mm.

29.2 Paper: Black, 350GSM Galerie silk.

29.3 Finishing: Matt laminated both sides, round cornering, trimmed to size.

29.4 Quantity: 32 per kit x 20 kit bags = 640 in total.

Table 29

NO.	ITEM TO BE PRINTED	VARIETY	QUANTITY= VARIETY (1)X (32) SETS X(20 KITS
1.	Card dividers	1	640

ANNEXURE 30: FACILITATOR GUIDE (FG) COLLATION INSTRUCTIONS

30. Collation instructions is as follows:

30.1 Quantity: There are 20 red x Facilitator Guide (FG) files of which 5 will be procured through the contractor and remaining 15 will be provided to the contractor by the FSCA.

30.2 The contractor will be required to remove the inserts in the existing 15 FG files shrink wrap the old content and replace these with the new printed inserts.

Table 30

NO.	COLLATION ORDER	NO. OF FILES
1.	Relevant file cover and spine to be inserted in the file: 1.1 Facilitator guide File cover 1.2 Facilitator guide File spine	20
2.	2.1 A4 Executive Summary FSCA MyMoney Learning Series 2.2 A4 FSCA - analysis and insight	
3.	3.1 Divider 1: My notes No documents included here	
4.	4.1 Divider 2: Facilitator guidelines 4.2 A4 FSCA learning series introduction	
5.	5.1 Divider 3: Icebreakers and energisers 5.2 A4 Icebreakers FG 5.3 A4 Be in control of your finances FG 5.4 A4 Social grants FG	
6.	6.1 Divider 4: Life Experiences 6.2 A4 Life Experiences FG	
7.	7.1 Divider 5: Financially smart (yellow) <i>Documents filed in the order of the index on the back of the divider</i> 7.2 A4 Save for unexpected expenses FG	

NO.	COLLATION ORDER	NO. OF FILES
	7.3 A4 Interest FG 7.4 A4 How to budget FG	
8.	8.1 Divider 6: Financial safeguard (blue) <i>Documents filed in the order of the index on the back of the divider</i> 8.2 A4 Financial Advisors FG 8.3 A4 Financial Plans FG 8.4 A4 Getting Financial Advice FG 8.5 A4 Savings vs investments FG 8.6 A4 Informal savings FG 8.7 A4 Banking products FG 8.8 A4 Understanding investments FG 8.9 A4 Making a financial or investment decision FG 8.10 A4 Fixed and variable interest investment FG 8.11 A4 Planning for retirement FG 8.12 A4 Claim unclaimed pension fund benefits FG 8.13 A4 Digital currency FG 8.14 A4 Short and long term insurance FG	
9.	9.1 Divider 7: Financial Protection (purple) <i>Documents filed in the order of the index on the back of the divider</i> 9.2 A4 Safeguard your finances FG 9.3 A4 Scams FG 9.4 A4 Financial stress FG	

NO.	COLLATION ORDER	NO. OF FILES
	9.5 A4 Last will and testament FG	
10.	10.1 Divider 8: Financial Knowledge (green) <i>Documents filed in the order of the index on the back of the divider</i> 10.2 A4 Payments FG 10.3 A4 Bank accounts FG 10.4 A4 Currencies FG 10.5 A4 Payslips FG 10.6 A4 Tax FG 10.7 A4 Statements and bills FG 10.8 A4 Contracts FG	
11.	11.1 Divider 9: Business Finance (Orange/red) <i>Documents filed in the order of the index on the back of the divider</i> 11.2 A4 Start a business FG 11.3 A4 Finances and business FG	

ANNEXURE 31: MORE ABOUT (MA) FILE COLLATION INSTRUCTIONS

31. Collation instructions is as follows:

31.1 Quantity: There are 20 red x More About (MA) files of which 5 will be procured through the contractor and remaining 15 will be provided to the contractor by the FSCA.

31.2 The contractor will be required to remove the inserts in the existing 15 MA files, shrink wrap the old content and replace these with the new printed inserts.

Table 31

NO.	COLLATION ORDER	NO. OF FILES
1.	Relevant file cover and spine to be on the file: 1.1 More about File cover 1.2 More about File spine	20
2.	2.1 A4 Executive Summary FSCA MyMoney Learning Series	
3.	3.1 Divider 1: Glossary 3.2 A4 Financially Smart Glossary 3.3 A4 Financial Safeguard Glossary 3.4 A4 Financial Protection Glossary 3.5 A4 Financial Knowledge Glossary 3.6 A4 Business Finance Glossary	
4.	4.1 Divider 2: Financially smart (yellow) 4.2 A4 Save for unexpected expenses MA 4.3 A4 Interest MA 4.4 A4 How to budget 4.5 A4 Be in control of your finances MA 4.6 A4 Social Grants MA	

NO.	COLLATION ORDER	NO. OF FILES
5.	5.1 Divider 3: Financial safeguard (blue) 5.2 A4 Financial Advisors MA 5.3 A4 Financial Plans MA 5.4 A4 Getting Financial Advice MA 5.5 A4 Savings vs investments MA 5.6 A4 Informal savings MA 5.7 A4 Banking products MA 5.8 A4 Understanding investments MA 5.9 A4 Making a financial or investment decision MA 5.10 A4 Fixed and variable interest investment MA 5.11 A4 Planning for retirement MA 5.12 A4 Claim unclaimed pension fund benefits MA 5.13 A4 Digital currency MA 5.14 A4 Short and long term insurance MA	
6.	6.1 Divider 4: Financial Protection (purple) 6.2 A4 Safeguard your finances MA 6.3 A4 Scams MA 6.4 A4 Financial stress MA 6.5 A4 Last Will and Testament MA	

NO.	COLLATION ORDER	NO. OF FILES
7.	7.1 Divider 5: Financial Knowledge (green) 7.2 A4 Payments MA 7.3 A4 Bank accounts MA 7.4 A4 Currencies MA 7.5 A4 Payslips MA 7.6 A4 Tax MA 7.7 A4 Statements and bills MA 7.8 A4 Contracts MA	
8.	8.1 Divider 6: Business Finance (Orange/red) 8.2 A4 Start a business MA 8.3 A4 Finances and business MA	

ANNEXURE 32: BLIND COLLATERAL (BC) FILE COLLATION INSTRUCTIONS

32. Collation instructions is as follows:

32.1 Quantity: There are 20 x black Blind Collateral (BC) files.

Table 32

NO.	COLLATION ORDER	NO. OF FILES
1.	Relevant file cover and spine to be on the file: 1.1 Facilitator guide for the blind and partially sighted File cover 1.2 Facilitator guide for the blind and partially sighted File spine	20
2.	2.1 A4 Executive Summary FSCA MyMoney Learning Series 2.2 A4 FSCA - analysis and insight	
3.	3.1 Divider 1: My notes 3.2 No documents included here	
4.	4.1 Divider 2: Facilitator guidelines 4.2 A4 FSCA learning series introduction	
5.	5.1 Divider 3: Icebreakers and energisers 5.2 A4 Icebreakers FG	

NO.	COLLATION ORDER	NO. OF FILES
6.	6.1 Divider 5: Financially smart (yellow) (DR stands for Delegate Resource) 6.2 A4 FG Save for unexpected expenses 6.3 A4 DR Saving for unexpected expenses 6.4 A4 FG Interest 6.5 A4 DR Interest 6.6 A4 FG How to budget 6.7 A4 DR How to budget 6.8 A4 FG Be in control of your finances 6.9 A4 DR Be in control of your finances 6.10 A4 FG Social grants 6.11 A4 DR Social Grants	
7.	7.1 Divider 6: Financial safeguard (blue) 7.2 A4 FG Financial Advisors 7.3 A4 DR Financial Advisors 7.4 A4 FG Savings vs investments 7.5 A4 DR Savings vs investments 7.6 A4 FG Fixed and variable interest investment 7.7 A4 DR Fixed and variable interest investment products 7.8 A4 FG Planning for retirement 7.9 A4 DR Planning for retirement 7.10 A4 FG Claim unclaimed pension fund benefits	

NO.	COLLATION ORDER	NO. OF FILES
	7.11 A4 DR Claim unclaimed pension fund benefits 7.12 A4 FG Short and long term insurance 7.13 A4 DR Short and long term insurance	
8.	8.1 Divider 7: Financial Protection (purple) 8.2 A4 FG Last will and testament 8.3 A4 DR Last will and testament	
9.	9.1 Divider 9: Business Finance (Orange/red) 9.2 A4 Finances and business FG 9.3 A4 DR Finance and business	

ANNEXURE 33: COLLATION INSTRUCTION FOR KIT BAGS

33. Packaging instructions is as follows:

33.1 An FSCA representative will collate a sample bag together with the successful contractor as an example to follow.

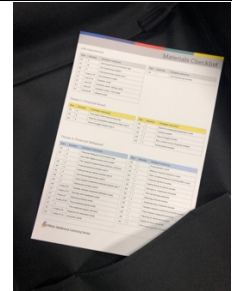
33.2 The successful contractor has procured 5 kit bags.

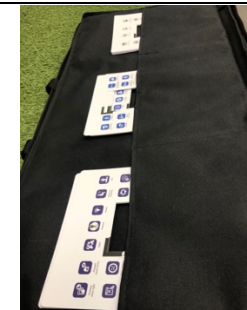
33.3 The successful contractor is required to collect the existing 15 kit bags from the FSCA. Remove the old contents, shrink wrap the old contents that won't be reused and replace with new contents as per this printing tender.

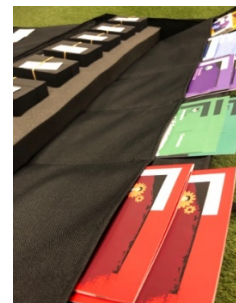
33.4 There is a total of 20 kit bags that need to be packed.

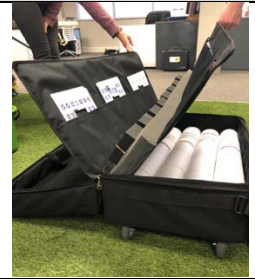
Table 33

NO.	PACKAGING INSTRUCTION	SAMPLE IMAGE
1.	1.1 Refer to image for top view of the kit bag. 1.2 Branded with the FSCA logo in white on the bottom RIGHT-HAND side, and FSCA MyMoney Logo in the center. 1.3 The bags are also branded with numbers 1-20.	
2.	2.1 Refer to image for side view of the kit bag. 2.2 Weight of the contents needs to be distributed evenly within the bags. The bags weight approximately 50kg each with contents. 2.3 The bag must have wheels and strong straps to pull or carry the bag. The bag must be able to stand secure on its side, vertically.	

NO.	PACKAGING INSTRUCTION	SAMPLE IMAGE
3.	1.1 Place the branding for all files in the cover and spine. Pack 1x FG, 1x MA and 1x BC file in each bag.	
4.	4.1 Place the files into the Velcro sleeve in the top inside of the bag. There are velcro pockets for the files.	
5.	5.1 2 X A4 Materials checklist to be placed in the A4 sized pocket opposite the file compartment as well as 1x A4 Game board instructions.	

NO.	PACKAGING INSTRUCTION	SAMPLE IMAGE
6.	6.1 Each kit has 4 sets of each type of A7 card which is separated by a card divider. Place cards into the boxes. Note: you will have Themes (colours) spanning across 2 boxes. 6.2 The FSCA will provide you with the black boxes for the existing kit bags.	 
7.	7.1 8 x A7 branded black boxes, rubber-band bound and placed into the custom foam section per bag.	
8.	8.1 A4 Window cards to be placed into the 3x A4 sized pockets. Distribute the window cards equally by theme/colour between the three compartments. 8.2 Pack Window cards & Handouts as per printing specification quantities into each bag.	

NO.	PACKAGING INSTRUCTION	SAMPLE IMAGE
9.	9.1 Delegate booklets to be grouped by theme/colour and placed and packed into the 5x A5 custom sized sleeves. 9.2 Pack 1x booklet, pamphlet & Z-card of each type in each bag. 9.3 Pack A5 Variable interest definition cards as per printing specification quantities into each bag.	
10.	10.1 Refer to image for packed bag.	
11.	11.1 PVC maps/environmental maps to be rolled by theme where possible otherwise, use discretion to ensure equal quantities so that the base of the bag is balanced. 11.2 Quantity of maps and posters per kit should be as per the printing specifications. 11.3 Pack 1x game board into each bag.	
12.	12.1 Posters to be rubber bound and labelled (directly behind and onto the posters).	

NO.	PACKAGING INSTRUCTION	SAMPLE IMAGE
13.	13.1 Visual for reference of the different components of the kit bag.	
14.	14.1 Place 20 tokens in a clear bag x 20. Place one bag of tokens in each kit.	No image.
15.	15.1 BC cards with holes. Package as per printing specification into each kit.	No image.

ANNEXURE 34: PACKAGING OF PROCURED, BRANDED, REBRANDED, PRINTED AND COLLATED ITEMS

34. Packaging instructions is as follows:

34.1 Packaging instructions for the 20xblack kit bags, old contents, new contents, casey bags and poster roller tubes.

Table 34

NO.	PACKAGING INSTRUCTIONS	QUANTITY
1.	School case: Package the branded and rebranded casey bags into boxes of 5 units. The boxes must be labeled accordingly.	20
2.	Poster roller tubes: Package branded poster roller tubes into one box. The poster roller tubes must be empty. The boxes must be labeled accordingly.	5
3.	Old contents: Shrink wrap printed items. Do not damage the old stock as you will have to replace damaged items. Place each kits' contents in a separate box and label accordingly.	15 sets into 15 boxes
4.	Black kit bags: Each bag (20) to be shrink wrapped to protect the contents and the bag. Bags to be transported as fragile.	20
5.	Booklets, Z-cards and Pamphlets: Shrink-wrap in quantities of 250 per title. The boxes must be labeled with the details of the contents.	Place in boxes containing 250 units each

F. STANDARD BIDDING DOCUMENTS

Standard Bidding Document (SBD 1)

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE FINANCIAL SECTOR CONDUCT AUTHORITY					
BID NUMBER:	FSCA2021/22-T009	CLOSING DATE:	14 December 2021	CLOSING TIME:	11H00
DESCRIPTION	PROCURE, BRAND, REBRAND, PRINT, COLLATE, PACKAGE AND DELIVER THE MYMONEY LEARNING SERIES FACILITATOR GUIDES AND DELEGATE RESOURCES TO THE FSCA				
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 Unit				
FACSIMILE NUMBER	Not applicable				
E-MAIL ADDRESS	tenders@fsc.co.za				
TELEPHONE NUMBER	012 422 2980/ 012 367 7847				
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] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] ☐ Yes ☐ No
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]				
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ 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.				

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:

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

2. TAX COMPLIANCE REQUIREMENTS

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

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

SIGNATURE OF BIDDER:

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

DATE:

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Standard Bidding Document (SBD 3.1)

PRICING SCHEDULE – FIRM PRICES (Purchases)

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

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

NAME OF BIDDER:.....BID NO.: **FSCA2021/22-T009**

CLOSING TIME **11:00**

CLOSING DATE: **14 DECEMBER 2021**

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED) R.....
-	Required by:	
-	At:	
-	Brand and model	
-	Country of origin	
-	Does the offer comply with the specification(s)?	*YES/NO
-	If not to specification, indicate deviation(s)	
-	Period required for delivery	 *Delivery: Firm/not firm
-	Delivery basis	

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

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

*Delete if not applicable

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Standard Bidding Document (SBD 4)

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
 2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representative:
 - 2.2 Identity Number:
 - 2.3 Position occupied in the Company (director, trustee, shareholder²) :.....
 - 2.4 Company Registration Number:
 - 2.5 Tax Reference Number:
 - 2.6 VAT Registration Number:
 - 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.
- ¹"State" means –
- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
 - (b) any municipality or municipal entity;
 - (c) provincial legislature;
 - (d) national Assembly or the national Council of provinces; or
 - (e) Parliament.
- ²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

Standard Bidding Document (SBD 4)

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
 2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representative:
 - 2.7 Identity Number:
 - 2.8 Position occupied in the Company (director, trustee, shareholder²) :.....
 - 2.9 Company Registration Number:
 - 2.10 Tax Reference Number:
 - 2.11 VAT Registration Number:
 - 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.
- ¹"State" means –
- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
 - (b) any municipality or municipal entity;
 - (c) provincial legislature;
 - (d) national Assembly or the national Council of provinces; or
 - (e) Parliament.
- ²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

DECLARATION OF INTEREST (continuation)

2.12 Are you or any person connected with the bidder presently employed by the state?

TICK APPLICABLE

YES	NO

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person connected to the bidder is employed :

Position occupied in the state institution:

Any other particulars:

.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative Work outside employment in the public sector?

TICK APPLICABLE

YES	NO

2.7.2.1 If yes, did you attach proof of such authority to the ? bid document?

TICK APPLICABLE

YES	NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....

2.13 Did you or your spouse, or any of the company's Directors /trustees /shareholders /members or their spouse conduct business with the state in the previous twelve months?

TICK APPLICABLE

YES	NO

2.8.1. If so, furnish particulars:

.....

DECLARATION OF INTEREST (continuation)

- 2.14 Do you or any person connected with the bidder have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid

TICK APPLICABLE

YES	NO

- 2.9.1. If so, furnish particulars:

.....

- 2.15 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

TICK APPLICABLE

YES	NO

- 2.10.1. If so, furnish particulars:

.....

- 2.16 Do you or any of the directors /trustees/shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract?

TICK APPLICABLE

YES	NO

- 2.11.1. If so, furnish particulars:

.....

3. Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Reference Number	Tax Number	State Employee Number / Peral Number

4 DECLARATION

I, THE UNDERSIGNED (NAME)
 CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS
 CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN
 TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD
 THIS DECLARATION PROVE TO BE FALSE.

.....
 Signature

.....
 Date

.....
 Position

.....
 Name of bidder

Standard Bidding Document (SBD 6.1)

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

- (a) The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or
- (b) The 80/20 preference point system will be applicable to this tender.

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

SBD 6.1

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL
PROCUREMENT REGULATIONS 2017 (continuation)**

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
 - 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE**3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS**

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right) & \text{or} & P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)
 \end{array}$$

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017 (continuation)

Where

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

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

SBD 6.1

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT
REGULATIONS 2017 (continuation)**

5. BID DECLARATION

- 5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 6.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)
 (Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

- 7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES		NO	
-----	--	----	--

- 7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES		NO	
-----	--	----	--

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at least 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

SBD 6.1

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL
PROCUREMENT REGULATIONS 2017 (continuation)**

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
☐ One-person business/sole propriety
☐ Close corporation
☐ Company
☐ (Pty) Limited

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

COMPANY CLASSIFICATION

- ☐ Manufacturer
☐ Supplier
☐ Professional service provider
☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

8.6 Total number of years the company/firm has been in business:.....

8.7 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
 ii) The preference points claimed are in accordance with the General Conditions as

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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 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding 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 bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

WITNESSES 1. 2.	 SIGNATURE(S) OF BIDDERS(S) DATE: ADDRESS.....
---	---

EXAMPLE OF SWORN AFFIDAVIT TO BE USED

SWORN AFFIDAVIT – B-BBEE EXEMPTED MICRO ENTERPRISE - GENERAL

I, the undersigned,

Full name & Surname	
Identity number	

Hereby declare under oath as follows:

1. The contents of this statement are to the best of my knowledge a true reflection of the facts.
2. I am a Member / Director / Owner of the following enterprise and am duly authorised to act on its behalf:

Enterprise Name:	
Trading Name (If Applicable):	
Registration Number:	
Enterprise Physical Address:	
Type of Entity (CC, (Pty) Ltd, Sole Prop	
Nature of Business:	
Definition of “Black People”	As per the Broad-Based Black Economic Empowerment Act 53 of 2003 as Amended by Act No 46 of 2013 “Black People” is a generic term which means Africans, Coloureds and Indians – (a) who are citizens of the Republic of South Africa by birth or descent; or (b) who became citizens of the Republic of South Africa by naturalisation- i. before 27 April 1994; or ii. on or after 27 April 1994 and who would have been entitled to acquire citizenship by naturalization prior to that date;”

Definition of “Black Designated Groups”	“Black Designated Groups means: (a) unemployed black people not attending and not required by law to attend an educational institution and not awaiting admission to an educational institution; (b) Black people who are youth as defined in the National Youth Commission Act of 1996; (c) Black people who are persons with disabilities as defined in the Code of Good Practice on employment of people with disabilities issued under the Employment Equity Act; (d) Black people living in rural and under developed areas;
--	---

3. I hereby declare under Oath that:

- The Enterprise is ___% Black Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- The Enterprise is ___% Black Female Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- The Enterprise is ___% Black Designated Group Owned as per Amended Code Series 100 of the Amended Codes of Good Practice issued under section 9 (1) of B-BBEE Act No 53 of 2003 as Amended by Act No 46 of 2013,
- Black Designated Group Owned % Breakdown as per the definition stated above:
 - Black Youth % = ___%
 - Black Disabled % = ___%
 - Black Unemployed % = ___%
 - Black People living in Rural areas % = ___%
 - Black Military Veterans % = ___%
- Based on the Financial Statements/Management Accounts and other information available on the latest financial year-end of __, the annual Total Revenue was R10,000,000.00 (Ten Million Rands) or less
- Please Confirm on the below table the B-BBEE Level Contributor, **by ticking the applicable box.**

100% Black Owned	Level One (135% B-BBEE procurement recognition level)	
At least 51% Black Owned	Level Two (125% B-BBEE procurement recognition level)	
Less than 51% Black Owned	Level Four (100% B-BBEE procurement recognition level)	

4. I know and understand the contents of this affidavit and I have no objection to take the prescribed oath and consider the oath binding on my conscience and on the Owners of the Enterprise which I represent in this matter.
5. The sworn affidavit will be valid for a period of 12 months from the date signed by commissioner.

Deponent Signature: _____

Date: _____

Commissioner of Oaths
Signature & stamp

Standard Bidding Document (SBD 6.2)

DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS

This Standard Bidding Document (SBD) must form part of all bids invited. It contains general information and serves as a declaration form for local content (local production and local content are used interchangeably).

Before completing this declaration, bidders must study the General Conditions, Definitions, Directives applicable in respect of Local Content as prescribed in the Preferential Procurement Regulations, 2017, the South African Bureau of Standards (SABS) approved technical specification number SATS 1286:2011 (Edition 1) and the Guidance on the Calculation of Local Content together with the Local Content Declaration Templates [Annex C (Local Content Declaration: Summary Schedule), D (Imported Content Declaration: Supporting Schedule to Annex C) and E (Local Content Declaration: Supporting Schedule to Annex C)].

1. General Conditions

- 1.1. Preferential Procurement Regulations, 2017 (Regulation 8) make provision for the promotion of local production and content.
- 1.2. Regulation 8.(2) prescribes that in the case of designated sectors, organs of state must advertise such tenders with the specific bidding condition that only locally produced or manufactured goods, with a stipulated minimum threshold for local production and content will be considered.
- 1.3. Where necessary, for tenders referred to in paragraph 1.2 above, a two stage bidding process may be followed, where the first stage involves a minimum threshold for local production and content and the second stage price and B-BBEE.
- 1.4. A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 1.5. The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286: 2011 as follows:

$$LC = [1 - x / y] * 100$$

Where

x is the imported content in Rand

y is the bid price in Rand excluding value added tax (VAT)

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Prices referred to in the determination of x must be converted to Rand (ZAR) by using the exchange rate published by South African Reserve Bank (SARB) on the date of advertisement of the bid as indicated in paragraph 3.1 below.

The SABS approved technical specification number SATS 1286:2011 is accessible on [http://www.thedti.gov.za/industrial development/ip.jsp](http://www.thedti.gov.za/industrial%20development/ip.jsp) at no cost.

- 1.6.A bid may be disqualified if this Declaration Certificate and the Annex C (Local Content Declaration: Summary Schedule) are not submitted as part of the bid documentation;
- 2. The stipulated minimum threshold(s) for local production and content (refer to Annex A of SATS 1286:2011) for this bid is/are as follows:**

<u>Description of services, works or goods</u>	<u>Stipulated minimum threshold</u>
_____	_____ %
_____	_____ %
_____	_____ %

- 3. Does any portion of the goods or services offered have any imported content?
(Tick applicable box)**

YES	☐	NO	☐
-----	--------------------------	----	--------------------------

- 3.1** If yes, the rate(s) of exchange to be used in this bid to calculate the local content as prescribed in paragraph 1.5 of the general conditions must be the rate(s) published by SARB for the specific currency on the date of advertisement of the bid.

The relevant rates of exchange information is accessible on www.resbank.co.za

Indicate the rate(s) of exchange against the appropriate currency in the table below (refer to Annex A of SATS 1286:2011):

Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

NB: Bidders must submit proof of the SARB rate (s) of exchange used.

4. Where, after the award of a bid, challenges are experienced in meeting the stipulated minimum threshold for local content the dti must be informed accordingly in order for the dti to verify and in consultation with the AO/AA provide directives in this regard.

LOCAL CONTENT DECLARATION
(REFER TO ANNEX B OF SATS 1286:2011)

LOCAL CONTENT DECLARATION BY CHIEF FINANCIAL OFFICER OR OTHER LEGALLY RESPONSIBLE PERSON NOMINATED IN WRITING BY THE CHIEF EXECUTIVE OR SENIOR MEMBER/PERSON WITH MANAGEMENT RESPONSIBILITY (CLOSE CORPORATION, PARTNERSHIP OR INDIVIDUAL)

IN RESPECT OF BID NO.

ISSUED BY: (Procurement Authority / Name of Institution):

.....
 NB

- 1 The obligation to complete, duly sign and submit this declaration cannot be transferred to an external authorized representative, auditor or any other third party acting on behalf of the bidder.
- 2 Guidance on the Calculation of Local Content together with Local Content Declaration Templates (Annex C, D and E) is accessible on http://www.thedti.gov.za/industrial_development/ip.jsp. Bidders should first complete Declaration D. After completing Declaration D, bidders should complete Declaration E and then consolidate the information on Declaration C. **Declaration C should be submitted with the bid documentation at the closing date and time of the bid in order to substantiate the declaration made in paragraph (c) below.** Declarations D and E should be kept by the bidders for verification purposes for a period of at least 5 years. The successful bidder is required to continuously update Declarations C, D and E with the actual values for the duration of the contract.

I, the undersigned, (full names),
 do hereby declare, in my capacity as
 of(name of bidder entity), the following:

- (a) The facts contained herein are within my own personal knowledge.
- (b) I have satisfied myself that:
 - (i) the goods/services/works to be delivered in terms of the above-specified bid comply with the minimum local content requirements as specified in the bid, and as measured in terms of SATS 1286:2011; and

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- (c) The local content percentage (%) indicated below has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 3.1 above and the information contained in Declaration D and E which has been consolidated in Declaration C:

Bid price, excluding VAT (y)	R
Imported content (x), as calculated in terms of SATS 1286:2011	R
Stipulated minimum threshold for local content (paragraph 3 above)	
Local content %, as calculated in terms of SATS 1286:2011	

If the bid is for more than one product, the local content percentages for each product contained in Declaration C shall be used instead of the table above. The local content percentages for each product has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 3.1 above and the information contained in Declaration D and E.

- (d) I accept that the Procurement Authority / Institution has the right to request that the local content be verified in terms of the requirements of SATS 1286:2011.
- (e) I understand that the awarding of the bid is dependent on the accuracy of the information furnished in this application. I also understand that the submission of incorrect data, or data that are not verifiable as described in SATS 1286:2011, may result in the Procurement Authority / Institution imposing any or all of the remedies as provided for in Regulation 14 of the Preferential Procurement Regulations, 2017 promulgated under the Preferential Policy Framework Act (PPPFA), 2000 (Act No. 5 of 2000).

SIGNATURE: _____

WITNESS No. 1 _____

DATE: _____

WITNESS No. 2 _____

DATE: _____

Standard Bidding Document (SBD 8)

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied). The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
	4.1.1 If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes ☐	No ☐

Item	Question	Yes	No
	4.2.1 If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
	4.4.1 If so, furnish particulars:		

I, THE UNDERSIGNED (FULL NAME).....
 CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
 Signature

.....
 Date

.....
 Position

.....
 Name of Bidder
 Js365bW

Standard Bidding Document (SBD 9)

CERTIFICATE OF INDEPENDENT BID DETERMINATION

1. This Standard Bidding Document (SBD) must form part of all bids¹ invited.
2. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
3. Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
4. This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid rigging.
5. In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete SBD 9

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

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SBD 9**CERTIFICATE OF INDEPENDENT BID DETERMINATION (continuation)**

in response to the invitation for the bid made by:

 (Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:
 (Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder.

SBD 9**CERTIFICATE OF INDEPENDENT BID DETERMINATION (continuation)**

6. 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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. 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 **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.**
10. 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.

.....
 Signature

.....
 Date

.....
 Position

.....
 Name of Bidder

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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 completed and signed?	
2.	SBD 3.3	Pricing Schedule	Is the form duly completed and signed?	
3.	SBD 4	Declaration of Interest	Is the form duly completed and signed?	
4.	SBD 6.1	Preference Points Claim Form for Preferential Procurement Regulations 2017	Is the form duly completed, B-BBEE points claimed, and form signed?	
5.	SBD 6.2	Declaration Certificate for Local Production and Content for Designated Sectors	Is the form duly completed and signed, Annexure C is attached?	
6.	B-BBEE status level verification certificate		Is proof of B-BBEE Status level of contributor attached?	
7.	SBD 8	Declaration: Abuse of Supply Chain Management Systems	Is the form duly completed and signed?	
8.	SBD 9	Certificate of Independent Bid Determination	Is the form duly completed and signed?	
9.	Tender submission		Two (2) printed copies (one original and one copy) 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