



2nd Floor, Block B Lakefield Office Park, 272 West Avenue, Die Hoewes, Centurion, 01574, Tel: +27 012 748 1000

VAT No.: 496 026 5751

RFQ NUMBER:	RFQ003092026
CLOSING DATE:	18 September 2026
CLOSING TIME	16:00 PM
DESCRIPTION OF BID:	Terms of Reference for the Costing and Budget Consultant: Development of South Africa's Global Fund Grant Cycle 8 (GC8) Request for Funding (Implementation Period: 1 April 2028 – 31 March 2031)
• Proposals must be submitted by email by no later than 16h00pm on 18 September 2026. • Only proposals submitted by email to: rfq@sanac.org.za will be accepted and reviewed—no late proposals will be reviewed. • Please use the reference “Costing and Budget Consultant: Development of South Africa's Global Fund Grant Cycle 8 (GC8) Request for Funding” in the email subject line. • Address to be put on the Quote: SANAC, Second Floor, Block B, Lakefield Office Park, 272 West Avenue, Centurion, Pretoria, VAT no: 496 026 5751	



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Terms of Reference for the Costing and Budget Consultant: Development of South Africa's Global Fund Grant Cycle 8 (GC8) Request for Funding (Implementation Period: 1 April 2028 – 31 March 2031)

1. Background

The South African National AIDS Council (SANAC) is a multisectoral body established to coordinate South Africa's response to HIV, Tuberculosis (TB) and Sexually Transmitted Infections (STIs). The South African Country Coordinating Mechanism (CCM), hosted by SANAC, is responsible for coordinating the development and submission of funding requests to the Global Fund to Fight AIDS, Tuberculosis and Malaria (Global Fund), and for overseeing the implementation of Global Fund grants.

South Africa is preparing its Grant Cycle 8 (GC8) Request for Funding for the implementation period 1 April 2028 to 31 March 2031. The Global Fund has allocated USD 402,982,744 to South Africa to support programmes for HIV, TB and Resilient and Sustainable Systems for Health (RSSH), subject to the development and approval of a technically robust, strategically prioritised and competitive Request for Funding.

The Request for Funding must be developed through an inclusive country dialogue process and informed by robust epidemiological, programmatic, financial and operational evidence. It must align with South Africa's national strategic priorities and comply with the Global Fund Allocation Letter, Funding Request Instructions, Modular Framework, Prioritisation Guidance, Sustainability, Transition and Co-financing (STC) Policy, Technical Review Panel (TRP) review criteria and all other applicable Global Fund guidance.

To support the development of a high-quality GC8 Request for Funding, SANAC seeks to appoint a multidisciplinary Costing and Budget Consultant to lead the development of the financial components of the application. The consultant will work closely and continuously with the Lead Coordinator, Lead Writer, technical consultants, CCM structures, SANAC Secretariat, Principal Recipients (PRs), government departments and other key stakeholders to ensure that every proposed intervention and activity, including support cost, are fully, accurately and transparently costed; that assumptions and unit costs are documented and evidence-based; and that the narrative, targets, implementation arrangements and budgets are aligned across all application documents.

2. Purpose of the Assignment

The purpose of the assignment is to develop the costing, budgeting, financing and related financial components of South Africa's Global Fund GC8 Request for Funding. The consultant must produce complete, evidence-based and accurately costed financial documentation that is technically sound, internally consistent and compliant with Global Fund requirements.



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Working closely with the CCM, SANAC Secretariat, Request for Funding Sub-Committee, Lead Coordinator, Lead Writer, Technical Support Unit (TSU), technical consultants, PRs and key stakeholders, the consultant will lead the development and consolidation of the funding landscape analysis, financial gap analysis, detailed programme budgets, co-financing documentation and all other financial annexes required for the Request for Funding.

The consultant will maintain a clear line of sight from agreed programme priorities and activities to targets, quantities, unit costs, cost assumptions, budget lines and implementation arrangements. All costing and budgeting outputs must be fully reconciled with the Funding Request narrative, Modular Framework, Performance Framework, Detailed Budget, Health Products Management Tool (HPMT), Prioritised Above Allocation Request (PAAR), STC requirements and other applicable Global Fund guidance.

As required, the consultant will provide technical support throughout country dialogue, technical working groups, writing retreats, validation workshops, CCM approval processes and the Global Fund Country Team and TRP clarification processes. The consultant will update and reconcile all financial components in response to agreed technical and stakeholder inputs. In doing so the consultant will collaborate closely with other technical consultants, for example, the Resilient and Sustainable Systems for Health System (RSSH) consultant, who will be leading the development of the HPMT and the health products and commodities quantification.

3. Scope of Work

3.1 Inception

The consultant will participate in an inception meeting with SANAC, the Request for Funding Sub-Committee, Lead Writer and relevant stakeholders to confirm the scope, methodology, deliverables, roles, reporting arrangements and timelines for the assignment.

The consultant will prepare an inception report and detailed workplan setting out the proposed methodology; costing and financial-analysis approaches; stakeholder engagement plan; document-control and version-management arrangements; quality-assurance mechanisms; deliverables; timelines; dependencies; and risks to successful completion of the assignment.

3.2 Financial Analysis, Activity Costing and Budget Development

The consultant will review the epidemiological, programmatic, financial, procurement, supply-chain and operational evidence required to inform the costing and budgeting of South Africa's GC8 Request for Funding.



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In close collaboration with the Lead Coordinator, Lead Writer, technical consultants, PRs and relevant stakeholders, the consultant will analyse the funding landscape, financing gaps, historical expenditure and absorption, implementation costs and programme-design assumptions. It will challenge, validate and document these inputs to support realistic, efficient and implementable budgets.

The consultant will develop and maintain the Funding Landscape analysis and tables, financial gap analysis, co-financing documentation, detailed programme budgets, Detailed Budget, PAAR costing and all other required financial annexes. Each activity must be costed at an appropriate level of detail using documented quantities, frequencies, unit costs, implementation periods and responsible implementers. Unsupported lump-sum amounts will not be accepted.

The consultant will work with SANAC, relevant government departments—including National Treasury and the National Department of Health—PRs and other stakeholders to obtain and document country co-financing commitments and consolidate module and intervention budgets. The consultant must verify that all activities and assumptions are clearly documented; potential duplication and double funding are identified and addressed; and financial information is consistent across the Funding Request package.

3.3 Development, Consultation and Validation of Financial Components

The consultant will coordinate the preparation, consolidation, review and version control of all financial components of the Request for Funding and maintain a reconciliation mechanism demonstrating consistency between the narrative, targets, workplans, implementation arrangements, Detailed Budget, HPMT, PAAR and other financial annexes.

As required, the consultant will participate in technical working groups, country dialogue sessions, bilateral consultations, writing retreats, validation workshops and relevant CCM meetings. It will present financial analyses, facilitate costing and prioritisation discussions, record agreed decisions and ensure that approved stakeholder inputs are accurately reflected in successive drafts.

Working closely with the Lead Coordinator, Lead Writer and each technical consultant or module lead, the consultant will cost every agreed intervention and activity and confirm that the budget reflects the approved programme design, targets, geographic scope, HPMT, implementation schedule, implementing entity and delivery approach. Any change to the narrative or programme design must be assessed for financial implications and incorporated consistently across all affected documents. In doing so the consultant will collaborate closely with other technical consultants, for example, the RSSH consultant, who will be leading the development of the HPMT and the health products and commodities quantification.



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3.4 Quality Assurance, Finalisation and Submission Support

The consultant will finalise all costing, budgeting, funding-landscape, co-financing and health-financing documentation for submission to the Global Fund. Budgets must be sufficiently detailed, supported by clear assumptions and calculations, free of unexplained lump sums, arithmetically accurate and compliant with Global Fund templates and guidance.

The consultant will conduct final quality assurance and cross-document reconciliation, address comments from SANAC, the CCM, PRs, the Global Fund Country Team and the TRP, and revise all financial components until the application review and clarification processes are concluded.

4. Deliverables and Payment Schedule

Deliverable	Description and acceptance requirements	Payment
1. Inception Report and Workplan	Inception report covering methodology, stakeholder engagement, detailed workplan, costing approach, document control, quality assurance and risk mitigation.	15%
2. Prioritisation and Costing Assumptions Note	Document lessons learned, available funding and financing gaps; set out agreed prioritisation principles; and establish the unit-cost sources, quantities, frequencies, inflation/exchange-rate assumptions and other parameters to be applied.	10%
3. First Draft Financial Package	First complete draft of the Funding Landscape, Detailed Budget, activity-level costing models, financial assumptions, PAAR costing and other required financial annexes, reconciled with the first complete Funding Request narrative and technical components.	15%
4. Second Draft Financial Package	Second complete and quality-assured financial package incorporating stakeholder feedback, with an updated narrative-to-budget reconciliation and consistency across modules, targets, implementers and application annexes.	20%
5. Final Submission-Ready Financial Package	Final Funding Landscape, Detailed Budget, PAAR costing, costing models, co-financing documentation, assumptions and other financial annexes; fully aligned with the approved narrative and implementation arrangements. Includes editable working files and a completed quality-assurance checklist.	25%
6. Global Fund Country Team and TRP Responses	Financial analyses and written responses to Country Team and TRP comments, together with all consequential financial revisions and reconciliations, until completion of the application clarification process.	15%

Specific timelines for each deliverable will be agreed during the inception phase and incorporated into the consultancy contract. However, timelines may change depending on submission and feedback timelines to and from the Country Team.



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5. Duration, Reporting and Administrative Arrangements

- The consultancy will be undertaken from 1 November 2026 to 30 November 2027, with an estimated level of effort of 80 consultancy days. The assignment will be funded and contracted through Unitaid/Wits RHI.
- While the consultancy spans thirteen (13) months, the assignment is milestone-driven. The consultant will be expected to manage and allocate the consultancy days in line with the Request for Funding development schedule, with limited inputs during the inception phase in 2026 and more intensive support required during the development, review and finalisation of the Request for Funding. The highest level of effort is anticipated during the drafting and refinement of the Request for Funding (March to June 2027), submission of the Funding Request (July 2027), Thereafter, the TRP comments, anticipated during October and November 2027.
- As required, the consultant may participate in technical working groups, country dialogue sessions, bilateral consultations, writing retreats, validation workshops, CCM meetings and other Request for Funding activities.
- The consultant must engage with every programme module and relevant technical consultant to ensure that all approved interventions and activities are fully integrated, appropriately prioritised and costed throughout the Request for Funding.
- The consultant must ensure that no lump sums are included in the budget and that the Funding Request narrative, targets, implementation arrangements, Detailed Budget, HPMT, PAAR and other financial annexes are fully aligned and reconciled before each formal submission.
- The consultant is primarily based in South Africa. Travel may be required in accordance with SANAC policies and subject to prior written approval.
- Payments will be made upon satisfactory completion, review and written approval of the agreed deliverables, in accordance with the payment schedule in these Terms of Reference.

6. Qualifications, Experience and Competencies

6.1 Qualifications

- A postgraduate qualification (Master's degree or higher) in Health Economics, Health Financing, Public Health, Accounting, Finance, Economics, Business Administration or a related field.

6.2 Experience

- At least ten (10) years' demonstrated experience in health financing, programme costing, budgeting and financial planning within the health sector.



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- Demonstrated experience supporting at least two successful Global Fund Funding Requests or comparable large-scale international donor funding applications.
- Extensive knowledge of Global Fund Funding Request Instructions, Modular Framework, Detailed Budget templates, STC Policy, PAAR, financial assurance requirements and TRP expectations.
- Demonstrated experience in funding-landscape analysis, financial-gap analysis, activity-based programme costing, budget consolidation, health-product costing and health financing.
- Experience working with multidisciplinary technical teams and facilitating complex costing, prioritisation and stakeholder-validation processes.
- Excellent analytical, financial modelling, quality-assurance, report-writing and communication skills.
- Experience working with national and provincial government departments, Principal Recipients, civil society organisations, development partners and technical working groups.

6.3 Competencies

- Strong analytical and quantitative skills, with demonstrated attention to detail.
- Expertise in activity-based programme costing, budget development and cross-document reconciliation.
- Excellent knowledge of Global Fund financial requirements and funding-request processes.
- Strong coordination, facilitation and stakeholder-engagement skills.
- Excellent report-writing, presentation and communication skills.
- Ability to work collaboratively under pressure and deliver high-quality outputs within tight timelines.

7. Applications will be evaluated using the following criteria:

The RFQ will be evaluated in 3 stages as mentioned below:

- Stage 1: SCM Administrative requirements.
- Stage 2: Technical / Functional evaluation.
- Stage 3: Price and BEE.

7.1 Stage 1: SCM Compliance requirements

Bidders must provide the following documents:

1.	Valid B-BBEE Certification/affidavit, if applicable.
2.	Recent copy of CSD report.
3.	Valid Tax Pin / TCC certificate



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4.	Completed SBD Forms (SBD 4 & 6.1)
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7.2 Stage 2: Technical / functionality evaluation

The proposals will be evaluated on functionality. An evaluation panel will allocate points in respect to functionality according to the criteria set out in the functionality table.

Evaluation Criteria	Weight Outline	Weight
Qualifications A postgraduate qualification, preferably Master's degree or higher, in Health Economics, Health Financing, Public Health, Accounting, Finance, Economics, Business Administration or a related field.	- Qualification not provided / Qualification not relevant = 0 - Relevant qualification = 10 - Relevant qualification at master's degree level or higher = 25	25
Experience Bidder to provide CV demonstrating the experience supporting development of Requests for Funding (added advantage would be given to Global Fund experience) .	- No CV provided / less than 10 years' experience = 0 - At least ten (10) years' demonstrated experience in health financing, programme costing, budgeting and financial planning within the health sector = 10 - Demonstrated experience supporting at least two successful Global Fund Funding Requests or comparable large-scale international donor funding applications = 15 - Knowledge and experience of Global Fund Funding Request Instructions, Modular Framework, Detailed Budget templates, STC Policy, PAAR, financial assurance requirements and TRP expectations = 15 - Experience working with multidisciplinary technical teams and facilitating complex costing, prioritisation and stakeholder-validation processes = 10 - Excellent analytical, financial modelling, quality-assurance, report-writing and communication skills = 10 - Experience working with national and provincial government departments, Principal Recipients, civil society organisations, development partners and technical working groups = 5	65



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Contactable references Letters	- No reference letter provided / reference letters not relevant/ less than 3 reference letters provided = 0 3 relevant reference letters provided = 10	10
The Bidder must provide three (3) relevant contactable reference letters as evidence of similar assignments undertaken.		
Total		100

Bidders who obtained 70 on Functionality will be evaluated on Price & BEE

7.3 Stage 3: Price and BEE

Preference point system (80/20)	Weighting percentage (Must add up to 100)
Price	Price 80 of 100
BEE:	20 of 100 Points
Total	100

i. Price Calculations

A maximum of 80/20 point system has been allocated to this bid on the following basis:

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration
 $P_{\min}$ = Price of lowest acceptable bid

ii. Point awarded for BBE status level of contributor

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 (80/20 system)
1	20



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2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

8. Confidentiality and Reservation of Rights

- All information, reports, analyses, assessments, programme designs, technical documents, funding request narratives, budgets, annexes and other materials developed or obtained during the course of this assignment shall remain the sole property of SANAC and CCM.
- The consultant shall maintain strict confidentiality and shall not disclose, reproduce, publish or use any information obtained through this assignment without the prior written approval of SANAC.
- All intellectual property, technical outputs, reports, presentations, tools, datasets and supporting documentation developed during the assignment shall become the property of SANAC and the CCM upon submission.
- SANAC reserves the right to accept or reject any proposal, cancel or amend the procurement process at any stage without assigning reasons, and negotiate with the preferred consultant where necessary. Appointment will be subject to successful contract negotiations, satisfactory reference checks and the availability of funding.

9. Proposal Format

- A detailed CV in response to this ToR is due on **XXXX** containing all the information required to evaluate the bid against the requirements stipulated in these terms of reference document. Please send your proposals to rfq@sanac.org.za the following should be attached to the proposal as annexures:
 - **Annexure A:** Summary of experience. Please attach CV/s and qualification of proposed team members, where applicable which show the range of similar assignments they have undertaken and the size of these assignments and three letters of reference
 - **Annexure B:** Consultant/Company Profile



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- **Annexure C:** Valid Tax Pin / TCC certificate
- **Annexure D:** Recent Central Supplier Database Report (CSD)
- **Annexure E:** Pricing information. Price proposals should include VAT and should be fully inclusive of ALL costs (including travel) to deliver the outputs indicated in the terms of reference. Budget notes should be provided to justify all expenses.
- **Annexure F :** Completed SBD Forms (SBD 4 & 6.1)
- **Annexure G:** Valid B-BBEE Certification/affidavit, if applicable.