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 B**
CLOSING DATE:	**13 November 2026 (EXTENDED TO 18 NOVEMBER 2026)**
CLOSING TIME	**16:00**
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)

- **Please note that this is a re-advertisement. Bidders who previously submitted applications are required to re-apply**.
- Proposals must be submitted by email by no later than 16h00 on 18 November 2026 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

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.

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.

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.

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	15%

Deliverable	Description and acceptance requirements	Payment
	financial revisions and reconciliations, until completion of the application clarification process.	

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.

5. Duration, Reporting and Administrative Arrangements

- The consultancy will be undertaken from 1 December 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 twelve (12) 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.
- Demonstrated experience supporting at least two successful large-scale international donor funding applications.
- Knowledge of Global Fund Funding Request Instructions, Modular Framework, Detailed Budget templates, STC Policy, PAAR, financial assurance requirements and TRP expectations is an added advantage.
- 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 international donor requirements, with knowledge and experience of Global Fund financial requirements, budgeting, and funding request processes considered an added advantage.
- 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
4.	Completed SBD Forms (SBD 4 & 6.1)

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 = **15** • Demonstrated experience completing at least two successful 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 = **5** • Experience working with multidisciplinary technical teams and facilitating complex costing, prioritisation and stakeholder-validation processes = **15** • Excellent analytical, financial modelling, quality-assurance, report-writing and communication skills = **10**	**65**

	• Experience working with national and provincial government departments, Principal/Prime Recipients (or equivalent entities), civil society organisations, development partners and technical working groups = **5**	
Contactable references Letters The Bidder must provide three (3) relevant contactable reference letters as evidence of similar assignments undertaken.	• No reference letter provided / reference letters not relevant/ less than 3 reference letters provided = **0** • 3 relevant reference letters provided = **10**	**10**
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:

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

Where
Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration Pmin = 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
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 **the 18 November 2026** 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
- **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.

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise, employed by the state? **YES/NO**

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

Full Name	**Identity Number**	**Name of State institution**

2.2 Do you, or any person connected with the bidder, have a relationship

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

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:
……
……

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

2.3.1 If so, furnish particulars:
……
……

3 DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;
3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.
3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring

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

institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

…… ……
Signature Date

…… ……
Position Name of bidder

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

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

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

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1. GENERAL CONDITIONS

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

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

1.2 **To be completed by the organ of state**

(*delete whichever is not applicable for this tender*).

a) The applicable preference point system for this tender is the 90/10 preference point system.

b) The applicable preference point system for this tender is the 80/20 preference point system.

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

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

(a) Price; and

(b) Specific Goals.

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

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

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

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

2. DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

(b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

(c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

(d) **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20 **or** **90/10**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \text{ or } \quad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. **FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT**

3.2.1. **POINTS AWARDED FOR PRICE**

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

80/20 **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \text{ or } \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

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

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

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
B-BBEE Status Level of Contributor		
Level 1	20	
Level 2	18	
Level 3	14	
Level 4	12	
Level 5	8	
Level 6	6	
Level 7	4	
Level 8	2	
Non-compliant contributor	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm…….

4.4. Company registration number: ……...

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

i) The information furnished is true and correct;

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;

iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

(a) disqualify the person from the tendering process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: .....

DATE: .....

ADDRESS: .....

.....

.....

.....