



health

Department:
Health
REPUBLIC OF SOUTH AFRICA



REQUEST FOR QUOTATIONS (RFQ)

APPOINTMENT OF A CONSULTANT TO REVIEW AND UPDATE THE NATIONAL HIV PREVENTION STRATEGY (2026–2030)

1. INVITATION TO BID

The National Department of Health (NDoH) hereby invites suitably qualified and experienced service providers/individual consultants to submit proposals for the review and updating of the National HIV Prevention Strategy (2026–2030).

2. BID DETAILS

Item	Description
Bid Title	Appointment of a Consultant: National HIV Prevention Strategy (2026–2030)
Bid Number:	315/2026/2027
Issue Date:	11/08/2026
Closing Date:	21/08/2026
Closing Time:	11:00 AM

Submission Method Email to purchasing@health.gov.za

Late submissions will not be considered.

3. BACKGROUND

Globally, the HIV epidemic remains a major public health challenge, with approximately 40.8 million people living with HIV and continued gaps in treatment coverage and viral suppression.

South Africa continues to face a quadruple burden of disease, carrying the largest HIV burden globally, with an estimated 8.1 million people living with HIV, and high prevalence among individuals aged 15–49 years.

Despite progress in reducing new infections and AIDS-related deaths, new HIV infections remain high, particularly among adolescent girls and young women (AGYW) and key populations.

Critical prevention challenges include:

- Engaging in risky sexual behaviour,
- Declining rates of correct and consistent use of condoms,
- Limited access to comprehensive men's health services,
- Suboptimal PrEP continuation
- Increasing STI rates
- Persistent structural barriers such as gender and power inequalities
- Stigma and discrimination,
- Socioeconomic barriers,
- Psychosocial and mental health barriers.

Therefore, it is important that the country's prevention response must continue to address persistent transmission, while also responding to changing epidemiological patterns, implementation gaps, and emerging digital and technological advances. The updated National HIV Prevention Strategy (2026 – 2030) should be aligned to broader goals of NSP (2023 – 2028), Health Promotion and Disease prevention agenda

anchored in a life-course approach that recognises the changing health needs and risks encountered by individuals from cradle to the grave.

4. PURPOSE OF THE RFP

The purpose of this RFP is to appoint a consultant to:

- Review and update the existing National HIV Prevention Strategy.
- Align the strategy with the NSP 2023–2028, Global AIDS Strategy, and emerging evidence.
- Strengthen combination prevention interventions aligned to the life-course approach.
- Facilitate stakeholder consultations and validation processes.
- Develop a final updated strategy document and dissemination materials.

5. OBJECTIVES

The updated National HIV Prevention Strategy must seek to achieve the following objectives:

- Strengthen Health Promotion as a core pillar of the HIV Prevention Strategy through interventions that support healthy behaviours, risk reduction, and health-seeking behaviours.
- Integrate HIV Prevention within a broader disease prevention framework that promotes early identification, screening, referral and management of HIV, STIs, TB, NCDs and other health priority conditions.
- Address biomedical, behavioural, and structural determinants of health that increase vulnerability to HIV, STIs, TB and other preventable conditions.
- Strengthen community-based and outreach prevention interventions.

6. SCOPE OF WORK

6.1 Epidemiological and Programme Review

- Review current epidemiological data on HIV incidence and prevalence at national and subnational levels.
- Review prevention programme performance and coverage across priority pillars, including:
 - Adolescent girls and young women (AGYW) and male partners
 - Key populations
 - Condom programming
 - Voluntary Medical Male Circumcision (VMMC)
 - Pre-exposure prophylaxis (oral and long-acting modalities)
 - STI prevention and management

6.2 Evidence Review and Gap Analysis

- Review recent effective evidence-based prevention interventions conducted locally and regionally.
- Identify gaps and opportunities based on available data and literature.

6.3 Framework Development

- Develop a revised conceptual framework demonstrating:
 - Adoption of a combination prevention approach
 - Health promotion as a foundation for prevention of diseases such as hypertension, diabetes mellitus, and cancer among people living with HIV
 - Integration of biomedical, behavioural and structural interventions delivered through community-based and facility-based platforms
 - Integration with existing community health delivery models such as District Development Models (DDM) and Operation Sukuma Sakhe (OSS)
 - Integration of community field workers to deliver combined HIV prevention services
 - A holistic approach to screening for HIV, TB, diabetes mellitus, hypertension, cancer and other conditions
 - A monitoring and evaluation framework with indicators for prevention

6.4 Stakeholder Engagement and Consultation

- Prepare a draft Prevention Strategy framework for stakeholder consultation.
- Facilitate consultation with a core expert group including NDoH, SANAC and relevant partners.

6.5 Drafting and Finalisation

- Develop the draft National HIV Prevention Strategy (2026–2030).
- Facilitate a dissemination workshop.
- Produce the final National HIV Prevention Strategy (2026–2030) document for NDoH approval, including an accompanying PowerPoint presentation summarising key strategic component.

7. DELIVERABLES

The consultant will be required to deliver:

1. Situational analysis of the HIV epidemic and prevention response (national and sub national) to be included in the Strategy.
2. Evidence synthesis of effective prevention interventions relevant to South Africa to be included in the Strategy.
3. Draft National HIV Prevention Framework (2026–2030) to be incorporated as a module within the final Strategy.
4. Draft National HIV Prevention Strategy (2026–2030).
5. Coordinated, person-centred, life-course based integrated service delivery model.
6. Final National HIV Prevention Strategy (2026–2030) – content complete and ready for formatting and graphic design.
7. PowerPoint presentation summarising the Strategy for stakeholder dissemination.

8. PROJECT DURATION

The project duration will be a period of 4 months after signing the service level agreement.

9. REQUIRED QUALIFICATIONS AND EXPERIENCE

Minimum Qualifications for the lead consultant

A Bachelor's or higher degree in Statistics, Biostatistics, Public Health, Economics, Social Sciences, or related field of study

Minimum Qualifications for the team members (Consultants)

National Diploma or Bachelor's Degree in Public Health, Social Sciences, or related field of study

Experience for the lead consultants

- Minimum 10 years' experience in:
- HIV, SRHR, TB or STI programming
- Data Analytics
- Strategy or Policy Development

Experience for the team members (Consultants)

- Each consultant should have a minimum of 5 years' experience in HIV and AIDS and STIs, TB & MCWH Programming, and/or Strategy and Policy Development

Competencies

- Strong epidemiological analysis and data interpretation skills
- Experience working with the National Department of Health and partners
- Demonstrated ability in stakeholder engagement and facilitation
- Strong technical writing and communication skills

- Experience integrating biomedical, behavioural and structural prevention interventions within combination prevention frameworks.
- Strong technical writing skills with evidence of authorship or co-authorship of national strategies, policy documents, technical guidelines or high-level reports.
- Timeliness: Ability to meet deadlines and deliverables promptly while maintaining a high standard of work.

10. REPORTING REQUIREMENTS

The consultant will report to:

- National Department of Health (HIV, AIDS and STIs Cluster).
- Technical support provided by WHO and the Global Fund.

11. EVALUATION CRITERIA

Bids will be evaluated on Technical competence and expertise, as well as Pricing and preference points.

12. PRICING AND PAYMENT

- Pricing must be in South African Rand (ZAR)
- This procurement is funded by the Global Fund. In order to comply with donor financial reporting and tax requirements, only suppliers registered for VAT with the South African Revenue Service will be considered
- Payments will be milestone-based, linked to the deliverables as follows:
 - Inception Report – 20%
 - First Draft Report– 40%
 - Final Deliverables – 40%

13. SUBMISSION REQUIREMENTS

Bidders must submit:

- Signed Curriculum Vitae (CVs) of key personnel. Failure to submit a signed CV will result in the service provider scoring a zero (0).
- Certified educational qualifications and ID/s for consultant and team
- Writing Sample
- Financial Proposal (detailed budget) and timeline
- Company profile (if applicable)
- Evidence of previous similar work
- At least three contactable references

14. CONDITIONS OF BID

- All submitted documents will become the intellectual property of the National Department of Health (NDoH).
- NDoH reserves the right not to award the Bid.
- Confidentiality must be maintained at all times.
- Bidders must comply with all applicable Supply Chain Management policies and Procurement regulations.

15. SUPPLY CHAIN MANAGEMENT EVALUATION PROCESS

The SCM evaluation process will be carried out in 3 stages:

Stage 1: Administrative Compliance evaluation/stage

Bidders must submit:

- Tax Compliance Status PIN issued by SARS.
- Company Registration Documents (if applicable)
- Completed and signed SBD 4, SBD 3.3 and SBD 6.1 forms.
- Central Supplier Database (CSD) number.

Stage 2: Functional Criteria

A functional evaluation approach will be applied to ensure that only suitably qualified and experienced service providers who meet a minimum threshold of 70% proceed to price and preference evaluation.

S. No.	Area of Assessment	Requirement	Evidence to be Submitted by Supplier	Weight (%)	Scoring Scale (0-5)														
	Relevant company experience in similar assignments	The bidder must demonstrate experience in the development or review of national, provincial or sector strategies, policies, frameworks, guidelines or programmes in public health, HIV, TB, STI, SRHR or related fields	Company profile (where applicable). Evidence of completed assignments (Testimonial letters or completion certificates or copies of work undertaken) developed.	20%	<table><tr><th>Experience in Similar Assignments</th><th>Score</th></tr><tr><td>5 or more similar assignments completed</td><td>5</td></tr><tr><td>4 similar assignments completed</td><td>4</td></tr><tr><td>3 similar assignments completed</td><td>3</td></tr><tr><td>2 similar assignments completed</td><td>2</td></tr><tr><td>1 similar assignment completed</td><td>1</td></tr><tr><td>No evidence submitted</td><td>0</td></tr></table>	Experience in Similar Assignments	Score	5 or more similar assignments completed	5	4 similar assignments completed	4	3 similar assignments completed	3	2 similar assignments completed	2	1 similar assignment completed	1	No evidence submitted	0
Experience in Similar Assignments	Score																		
5 or more similar assignments completed	5																		
4 similar assignments completed	4																		
3 similar assignments completed	3																		
2 similar assignments completed	2																		
1 similar assignment completed	1																		
No evidence submitted	0																		
	Contactable References letters from previous clients (for the company)	Contactable references for similar assignments completed within the last five (5) years	Reference letters on client letterheads. References must be signed and dated. References must include contact details of the client References must indicate the scope of work completed.	10%	<table><tr><th>Reference letters submitted</th><th>Score</th></tr><tr><td>3 or more references</td><td>5</td></tr><tr><td>2 references</td><td>3</td></tr><tr><td>1 reference</td><td>1</td></tr><tr><td>No reference letter submitted</td><td>0</td></tr></table>	Reference letters submitted	Score	3 or more references	5	2 references	3	1 reference	1	No reference letter submitted	0				
Reference letters submitted	Score																		
3 or more references	5																		
2 references	3																		
1 reference	1																		
No reference letter submitted	0																		
	Lead Consultant's experience	Minimum 10 years' experience in: HIV, SRHR, TB or STI programming Data Analytics Strategy or policy development	Detailed CV indicating years of experience.	5%	<table><tr><th>Lead consultant</th><th>Score</th></tr><tr><td>More than 12 years relevant experience</td><td>5</td></tr><tr><td>11-12 years relevant experience</td><td>4</td></tr><tr><td>Minimum of 10 years relevant experience</td><td>3</td></tr><tr><td>5-9 years relevant experience</td><td>2</td></tr><tr><td>Less than 5 years relevant experience</td><td>1</td></tr><tr><td>Requirements not met</td><td>0</td></tr></table>	Lead consultant	Score	More than 12 years relevant experience	5	11-12 years relevant experience	4	Minimum of 10 years relevant experience	3	5-9 years relevant experience	2	Less than 5 years relevant experience	1	Requirements not met	0
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More than 12 years relevant experience	5																		
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Minimum of 10 years relevant experience	3																		
5-9 years relevant experience	2																		
Less than 5 years relevant experience	1																		
Requirements not met	0																		
	Consultants' experience	A minimum of two supporting team members. Each consultant should have a minimum of 5 years' experience in HIV and AIDS	Detailed CV's indicating years of experience.	5%	<table><tr><th>Team members</th><th>Score</th></tr><tr><td>Consultants have more than 7 years</td><td>5</td></tr><tr><td>Consultants have 5-7 years relevant experience</td><td>4</td></tr><tr><td>Consultants have a minimum of 5 years relevant experience</td><td>3</td></tr><tr><td>Consultants have 2-4 years relevant experience</td><td>2</td></tr></table>	Team members	Score	Consultants have more than 7 years	5	Consultants have 5-7 years relevant experience	4	Consultants have a minimum of 5 years relevant experience	3	Consultants have 2-4 years relevant experience	2				
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Consultants have 2-4 years relevant experience	2																		

Area of Assessment	Requirement	Evidence to be Submitted by Supplier	Weight (%)	Scoring Scale (0–5)	
	and STIs, TB & MCWH Programming, and/or Strategy and Policy Development			Consultants have less than 2 years	1
				Requirements not met	0
Lead consultant's qualification	A Bachelor's or higher degree in Statistics, Biostatistics, Public Health, Economics, Social Sciences, or related field of study	Certified copies of qualifications	5%	Lead consultant's qualification	Score
Consultants qualification	A minimum of two supporting team members. Each member should have a National Diploma or Bachelor's Degree in Public Health, Social Sciences, or related field of study	Certified copies of qualifications	5%	Holds a PHD	5
				Holds a Master's Degree in a relevant field	4
				Holds a Bachelors Degree in the relevant field	3
				Holds a National Diploma in the relevant field	1
				Does not have the relevant experience	0
				Team members qualification	Score
				Holds a Master's degree in the relevant field	5
Holds a Bachelor's degree in the relevant field	4				
Holds a National Diploma in the relevant field	3				
Does not have the relevant qualification	0				
Methodology and Approach	The bidder must demonstrate a clear understanding of the Terms of Reference and present a practical approach to delivering all required outputs.	A technical proposal covering the following elements: • Approach to the epidemiological and programme review. • Evidence review and gap analysis methodology • Strategy and framework development approach. • Stakeholder consultation and validation process. • Workplan, timelines and deliverables.	35%	Proposal assessment	Score
				Methodology addresses all required elements and includes a realistic workplan, logical sequencing of activities, risk mitigation measures, and demonstrates alignment to relevant national policies, strategies and legislative frameworks applicable to HIV prevention and public health.	5
				Methodology addresses all required elements and includes a realistic workplan, logical sequencing of activities and risk mitigation measures.	4
				Methodology addresses all required elements and includes a realistic workplan and timelines.	3
				Methodology addresses at least two (2) of the required elements.	2

Area of Assessment	Requirement	Evidence to be Submitted by Supplier	Weight (%)	Scoring Scale (0-5)	
				Methodology submitted but addresses fewer than two (2) of the required elements.	1
				No methodology submitted	0
Sample Report / Writing Sample	The bidder must submit at least one sample of work demonstrating technical writing ability.	Any one of the following: • Strategy; • Policy; • Framework; • Guideline; • Technical report; • Peer-reviewed publication; • Research report. The sample must have been authored or co-authored by the lead consultant.	15%	Description	Score
				Sample demonstrates high-quality analytical, policy and strategy development skills, including evidence of authorship/co-authorship of national, provincial or sector-level documents	5
				Sample demonstrates strong analytical, policy and strategy development skills relevant to the scope of work	4
				Sample demonstrates experience in developing reports, policies, strategies or frameworks relevant to public health	3
				Sample demonstrates technical writing but limited evidence of policy, strategy or framework development	2
				Sample submitted but not relevant to the scope of work	1
				No sample submitted	0

NB: Only bidders that meet the minimum threshold of 70% shall be evaluated for price.

Stage 3: Price and Preference Points Evaluation (80/20)

Bidders must complete the SBD 3.3 (Pricing Schedule – Professional Services). Failure to submit a completed SBD 3.3 form and the **Annexure A** provided may result in the bid being regarded as non-responsive.

To claim preference points, fully complete and sign SBD 6.1 and submit all supporting documentation required in support of the specific goals claimed, including a valid B-BBEE Certificate or Sworn Affidavit where applicable.

Failure to submit a completed SBD 6.1 and the required supporting documentation will result in no preference points being allocated.

Where ownership is held through a trust, consortium, holding company or any other shareholding arrangement, bidders must submit:

- A shareholding certificate or equivalent document clearly indicating the ownership structure and percentage shareholding of each member, director or beneficiary; and
- Copies of identity documents for all shareholders, members or beneficiaries relevant to the specific goals claimed.

16. SUBMISSION INSTRUCTIONS

All quotations and supporting documentation **MUST** be submitted via email to: purchasing@health.gov.za

SUBMISSION DUE DATE AND TIME: 21 AUGUST 2026 AT 11:00 AM

NB: Late submissions will not be considered.

APPLICABILITY OF THE GENERAL CONDITION OF CONTRACT (GCC)

The appointment of the successful service provider will be subject to the General Conditions of Contract (GCC) for government procurement, as issued by National Treasury. All bidders are deemed to have read and understood these conditions. By submitting a quotation, suppliers acknowledge that the GCC will form part of the contract between themselves and the Department of Health.

The GCC is available on the National Treasury website and may be provided on request.

The bidder must take note of the following:

If the bidder replaces key personnel during the contract period, the replacement must possess equivalent or higher qualifications and experience. Any replacement must be made in consultation with the Department.

Travel costs must be based on AA rates, and accommodation will be limited to three-star establishments or equivalent.

When invoicing the Department, the bidder must indicate the cost of services and VAT as separate line items.

17. ENQUIRIES

All enquiries related to this bid must be directed to:

purchasing@health.gov.za

No late or telephonic submissions will be accepted.

17. DISCLAIMER

The NDoH is not bound to accept the lowest or any proposal and reserves the right to cancel or re-advertise this RFQ at any stage.

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	BID NO.: ...315-2026/2027.....
CLOSING TIME 11:00 AM	CLOSING DATE...21/08/2026.....

OFFER TO BE VALID FOR 60 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)	
1.	The accompanying information must be used for the formulation of proposals.		
2.	Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.	R.....	
3.	PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)		
4.	PERSON AND POSITION	HOURLY RATE	DAILY RATE
	.....	R.....	.....
	.....	R.....	.....
	.....	R.....	.....
	.....	R.....	.....
	.....	R.....	.....
5.	PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT		
	.....	R.....	 days
	.....	R.....	 days
	.....	R.....	 days
	.....	R.....	 days
5.1	Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.		
	DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY AMOUNT
	.....	.....	R.....
	.....	.....	R.....
	.....	.....	R.....
	.....	.....	R.....
		TOTAL: R.....	

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

Name of Bidder:

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....			R.....
.....			R.....
.....			R.....
.....			R.....

TOTAL: R.....

6. Period required for commencement with project after acceptance of bid
 7. Estimated man-days for completion of project
 8. Are the rates quoted firm for the full period of contract? *YES/NO
 9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

*[DELETE IF NOT APPLICABLE]

Any enquiries regarding bidding procedures may be directed to the –

(NATIONAL DEPARTMENT OF HEALTH @ PURCHASING@HEALTH.GOV.ZA)

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 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, 2022.

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 **exceed/not exceed** R50 000 000 (all applicable taxes included) and therefore the preference point system shall be applicable; or
- b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for 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.

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) **"price"** 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. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

4. POINTS AWARDED FOR PRICE

4.1 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

$$Ps = 80 \left(1 - \frac{Pt - Pmin}{Pmin} \right) \text{ or } Ps = 90 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmin = Price of lowest acceptable bid

4.2 FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME-GENERATING PROCUREMENT

4.3 POINTS AWARDED FOR PRICE

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

80/20

or

90/10

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

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmax = Price of highest acceptable bid

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

- 5.1 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

6. BID DECLARATION

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

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

- 7.1 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.)

8. SUB-CONTRACTING

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

(Tick applicable box)

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

- 8.1.1 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, 2022:

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		

9. DECLARATION WITH REGARD TO COMPANY/FIRM

9.1 Name of company/firm:.....

9.2 VAT registration number:.....

9.3 Company registration number:.....

9.4 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

.....

9.6 COMPANY CLASSIFICATION

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

[TICK APPLICABLE BOX]

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

9.8 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 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

.....

.....