

**APPOINTMENT OF A QUALIFIED SERVICE PROVIDER TO
CONDUCT TRAINING OF TRAINERS ON HUMAN RIGHTS
AND MEDICAL ETHICS (HRME) FUNDED BY THE GLOBAL
FUND UNDER THE NATIONAL DEPARTMENT OF HEALTH.**

BID NO.: IHPS-007-2026

DATE OF ISSUE: 04 MAY 2026

CLOSING DATE: 26 MAY 2026

TIME: 12H00

SBD1

INVITATION OF THE BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE INSTITUTE OF HEALTH PROGRAMS AND SYSTEMS					
BID NUMBER:	IHPS-007-2026	CLOSING DATE:	26 MAY 2026	CLOSING TIME:	12H00
DESCRIPTION	APPOINTMENT OF A QUALIFIED SERVICE PROVIDER TO CONDUCT TRAINING OF TRAINERS ON HUMAN RIGHTS AND MEDICAL ETHICS (HRME) FUNDED BY THE GLOBAL FUND UNDER THE NATIONAL DEPARTMENT OF HEALTH.				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO SIGN A WRITTEN CONTRACT					
BID RESPONSE DOCUMENTS MUST BE PHYSICALLY SUBMITTED TO 45 DE LA REY ROAD, THE GRID, GROUND FLOOR, RIVONIA, 2128					
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No			<input type="checkbox"/> No	
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
	<input type="checkbox"/>	A REGISTERED AUDITOR			
	NAME:				
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT (FOR EMEs& QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
	[IF YES ENCLOSE PROOF]			[IF YES ANSWER PART B:3 BELOW]	
SIGNATURE OF BIDDER		DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)					
TOTAL NUMBER OF ITEMS OFFERED			TOTAL BID PRICE (ALL INCLUSIVE)		
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:			TECHNICAL INFORMATION MAY BE DIRECTED TO:		
DEPARTMENT/ PUBLIC ENTITY			CONTACT PERSON		
CONTACT PERSON			TELEPHONE NUMBER		
TELEPHONE NUMBER			FACSIMILE NUMBER		
FACSIMILE NUMBER			E-MAIL ADDRESS		
E-MAIL ADDRESS					

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION	
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED) OR ONLINE
1.3.	BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.4.	WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.5.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
2. TAX COMPLIANCE REQUIREMENTS	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
2.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
3.1.	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.4.	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, THE BIDDER IS NOT ELIGIBLE TO SUBMIT A PROPOSAL.	

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

1. Background

The National Department of Health (NDoH) is a Principal Recipient (PR) of the Global Fund (GF) to Fight AIDS, Tuberculosis, and Malaria for the period October 2025 – March 2028. Under this grant, the NDoH is implementing a Human Rights and Medical Ethics (HRME) training programme to capacitate healthcare providers, particularly nurses in ethical practices and human rights principles related to HIV, TB, and sexual and reproductive health. Research demonstrates that stigma, discrimination, and human rights violations continue to hinder access to healthcare services for key and vulnerable populations. Training healthcare providers to uphold dignity, equity, and respect is therefore a crucial intervention under Goals 1 and 2 of the National Strategic Plan (NSP) for HIV, TB, and STIs 2023–2028. To enhance reach and sustainability, the NDoH plans to digitize and deliver the HRME training programme through an e-learning platform, complementing classroom sessions, and enabling continuous professional development for nurses nationwide.

To improve outreach and ensure sustainability, the NDoH has engaged the Institute of Health Programs and Systems (IHPS) to solicit proposals from qualified, experienced, and registered service providers to conduct training of trainers on Human Rights and Medical Ethics on its behalf.

NDoH and IHPS are committed to preventing and responding to Protection from Sexual Exploitation, Abuse and Harassment (PSEAH) in all their programmes and procurement activities. This assignment will be implemented in line with NDoH and IHPS PSEAH commitments and applicable donor safeguarding requirements. All service providers engaged under this TOR are required to uphold a zero-tolerance approach to PSEAH.

2. Purpose

These terms of reference seek to appoint a qualified service provider to deliver a training of trainers programme on Human Rights and Medical Ethics (HRME) to capacitate 80 master trainers across 9 provinces for Global Fund Sub-Recipients (SRs) and Regional Training Centre (RTC) managers. The successful service provider will utilize existing HRME training materials to deliver this training.

To enhance and expand in-class training of Healthcare providers in the areas of human rights and medical ethics related to HIV and Tuberculosis (TB) for key and vulnerable populations (KVPs).

The aim is to scale up training for healthcare providers on human rights and medical ethics related to HIV and TB. It will include in-person training, monitoring, and mentorship of trainers. Training of trainers (ToT) will be followed by support for cascaded training of healthcare providers in the 12 Global Fund-supported districts.

3. Overall Objective

To improve healthcare service delivery through enhanced understanding and practice of human rights and medical ethics among healthcare providers providing HIV and TB services in healthcare settings.

4. Specific Objectives

- Capacitate master trainers on HRME within the public health context.
- Enhance trainers' knowledge and competence in training on ethical principles, patient rights, confidentiality, and legal frameworks.
- Strengthen ethical decision-making through case studies, interactive activities, and scenario-based assessments.

5. Scope of Work

The appointed service provider's responsibility will be to:

- Familiarize themselves with the existing HRME training material (facilitator and participant manuals)
- Conduct two (2) 5-day Training of Trainers workshops (in-person) for 80 participants (40 participants per session)
- Assess participants' skills in:
 - Ethical analysis and decision-making
 - Facilitation and instructional techniques
 - Cultural sensitivity and rights-based approaches
 - Knowledge of adult education principles
- Provide coaching and feedback during practical facilitation sessions.
- Develop tools to evaluate:
 - Knowledge gain (pre- and post-tests)
 - Changes in attitude or confidence in handling ethical issues
 - Facilitation skills of new trainers

6. Deliverables

- Familiarize themselves with the existing HRME training material (facilitator and participant manuals) and, where necessary amend and update such materials to align with the approved ToT approach and current programme requirements.
- Develop slides tailored for HRME training of trainers
- Conduct training of trainers for Sub-Recipients (SRs) and Regional Training Center managers (RTCs) covering the following HRME training modules (12 modules)
 - Overview of Human Rights
 - HIV, TB, GBVF and the Law
 - Introduction to the NSP for HIV, TB, STIs, TB Strategic Plan, and NSP on GBVF
 - Key Populations and Vulnerable Groups
 - Stigma, Discrimination, and other Barriers
 - Sex, Gender and Sexuality

- Health Sector Response to GBVF
- Sexual and Reproductive Health and Rights (SRHR)
- Introduction to Ethics and Codes of Ethics for Healthcare Workers
- Core Ethical Values
- Ethical Decision-making Medical Ethics applied to HIV, TB, and STIs
- Detailed training agenda
- Evaluation tools (pre- & post-tests and end-of-course evaluation form)
- Attendance sheets and certification records
- Training report with analysis and recommendations

7. Expected Outcomes

- A total of 80 participants trained as master trainers
- Improved ethical decision-making and patient-centered care
- Strengthened institutional capacity for rights-based healthcare delivery

8. Roles and Responsibilities

Number	Responsible Stakeholder	Responsibility
1.	NDoH/IHPS	Coordination, conferencing, approvals, stakeholder engagement, and oversight
2.	Provincial Health Departments	Coordinating the availability and attendance of participants
3.	Service Provider	<ul style="list-style-type: none"> • Familiarize themselves with the existing HRME training material (facilitator and participant manuals) • Conduct training of trainers for Sub-Recipients (SRs) and Regional Training Center managers (RTCs)
4.	SRs & RTCs	Cascade HRME training to the 12 GF supported districts.

9. Duration and Implementation Timeline

Implementation of the project, including training reports, is expected to be completed within a period of 2 months from the date of appointment.

10. Risk Management

Bidders are required to identify key risks associated with the assignment, including but not limited to participant availability, logistics, trainer capacity, and coordination challenges, and propose mitigation strategies.

11. Conclusion

These terms of reference detail the NDoH strategy to engage a qualified service provider to conduct two master training sessions focused on HRME for healthcare providers. This initiative aims to facilitate rapid cascading of training for healthcare providers on HRME, ensuring equal access to professional development opportunities and fostering ethical, rights-based healthcare practices throughout South Africa.

12. Bid Evaluation Process

The bids will be evaluated in five (5) different phases; namely: administrative requirements, mandatory requirements, technical evaluation requirements, presentation, and price and preference points.

12.1 Phase 1: Administrative Requirements.

It is the responsibility of each Service Provider to ensure that completed documents are submitted on or before the closing date and time. (All documents should be duly signed)

12.1.1. Full Central Supplier Database (CSD) registration report.

12.1.2. Duly completed and signed SBD 1, SBD 4 and SBD 6.1.

12.1.3. Provide a valid Tax compliance Status PIN Report, as issued by the South African Revenue Services.

12.1.4. Copy of entity registration certificate with CIPC or proof of ownership/ shareholding

12.1.5. In case of Joint Venture, Consortium, Trust, or Partnership, a signed agreement by all parties must be submitted.

12.1.6. In the case of a Joint Venture, Consortium, Trust, or Partnership, a valid Tax compliance Status PIN Report for all companies must be submitted.

12.1.7. In the case of a Joint Venture, Consortium, Trust, or Partnership, a Consolidated CSD registration of all companies' CSD reports must be submitted.

Note: Bidders may be contacted in case additional information is required and failure to comply with the requirements above within 5 days after being informed, will lead to invalidation of your bid.

12.2 Phase 2: Mandatory Requirements

12.2.1. Duly completed and signed SBD 3.1.

Note: *Non-compliance with the above mandatory requirements will lead to automatic disqualification*

12.3 Phase 3: Functional Evaluation Requirements

12.3.1. Signed Global Fund Code of Conduct for suppliers of services. **(Annexure A)**

12.3.2. Company profile indicating the company experience, years of existence, resources, and capabilities.

12.3.3. Project workplan and methodology.

12.3.4. Organizational organogram indicating availability of the following key personnel to support the project: Lead Facilitator and Trainers.

12.3.5. Detailed CVs outlining experience of each key personnel.

12.3.6. Attach certified copies of NQF Level 8 qualifications of the key personnel.

12.3.7. Three (3) signed reference letters from three (3) different contactable clients for relevant or similar work completed, not more than 10 years ago. The reference letters must be in the referring entity's letterhead, indicating the scope of the project, contract period and contact details of the referring company.

12.4 Functionality Evaluation Criteria

Table 1: Functionality Evaluation Criteria

No.	Evaluation Criterion	Sub-Criteria / Scoring Guide	Max Points	Required Evidence
1	Relevant Experience in HRME / Public Health Training	<ul style="list-style-type: none"> 10 years and above: 20 5 - 9 years: 16 3 - 4 years: 12 1 - 2 years: 8 Less than 1 year: 4 No relevant experience: 0 	20	<ul style="list-style-type: none"> Organisational profile At least three (3) reference letters or contracts confirming HRME / public health / ToT experience
2	Methodology and Approach	<ul style="list-style-type: none"> Excellent - clearly articulated adult learning approach, participatory methods, case studies, assessments, mentorship: 20 Very Good - relevant and structured with minor gaps: 16 Adequate - meets ToR minimum requirements: 12 	20	<ul style="list-style-type: none"> Detailed technical proposal outlining methodology Training approach and agenda outline Assessment and facilitation methods

		<ul style="list-style-type: none"> • Weak - generic or partially aligned: 8 • Unacceptable - does not meet ToR: 0 		
3	Team Expertise and Qualifications	<ul style="list-style-type: none"> • Postgraduate qualification(s) with ≥8 years facilitation experience: 16 • Relevant qualification(s) with 5 - 7 years' experience: 13 • Relevant qualification(s) with 3 - 4 years' experience: 10 • Limited relevant experience: 6 • Inadequate or none: 0 	16	<ul style="list-style-type: none"> • CVs of key personnel (Lead Facilitator and Trainers) • Certified copies of qualifications • Roles and responsibilities of each team member
4	Understanding of the Assignment and ToR	<ul style="list-style-type: none"> • Excellent understanding of objectives, outcomes, ToT model, and Global Fund context: 12 • Good understanding with minor gaps: 10 • Adequate understanding (largely restates ToR): 7 • Poor understanding: 4 • No demonstrated understanding: 0 	12	<ul style="list-style-type: none"> • Narrative in the proposal demonstrating understanding of HRME, ToT objectives, target audience, and expected outcomes
5	Risk Management and Quality Assurance	<ul style="list-style-type: none"> • Comprehensive risk identification and mitigation with QA mechanisms: 12 • Key risks identified with reasonable mitigation: 10 • Some risks identified, weak mitigation: 7 • Risks noted without mitigation: 4 • No risk or QA plan: 0 	12	<ul style="list-style-type: none"> • Risk management and quality assurance plan covering logistics, coordination, delivery quality, and implementation risks
	TOTAL TECHNICAL SCORE		80	

Note: Bidders will be required to achieve a minimum threshold of 70% (56 points) to proceed to Phase 4, oral presentation phase, which will be out of a total of 20 points.

12.5 Phase 4: Oral Presentation

Bidders meeting the Phase 3 threshold will be invited to present their proposal. This phase includes the following:

- Q&A sessions with evaluation committee.
- Validation of submitted documentation and qualifications.

Bidders' presentations will be scored according to criteria in table 2 below.

Table 2: Oral Presentation Criteria

No.	Criterion	Description	Max Points
1	Understanding of the Assignment and TOR	Demonstrates clear and practical understanding of the assignment	5
2	Methodology and Proposed Training Approach	Articulates how the ToT will be implemented in practice	5
3	Facilitator Competence and Presentation Skills	Communication clarity, confidence, and facilitation ability	5
4	Responsiveness to Questions and Risk Awareness	Ability to respond to panel questions and address implementation risks	5
	Total Presentation Score		20

Points-Based Scoring Guide (Presentation)

Performance Level	Points
Excellent	5
Good	4
Adequate	3
Poor	2
Unacceptable / No response	0

Note: The points scored in Phase 3 and Phase 4 will be combined to produce a total score out of 100. Bidders who achieve a combined score of 70 points or more out of 100 will proceed to Phase 5. Phase 5 consists of the financial evaluation (Price and Specific Goals).

12.6 Phase 4: Price and Specific Goals

The 80/20 preference point system will be used to evaluate this bid; bidders must complete SBD 6.1 and provide supporting documentation for points allocation.

12.6.1. The bidders must submit Identity Documents, CSD and CIPC registration documents.

These documents will serve as proof of ownership and directorship of the company.

12.6.2. Failure on the part of a bidder to submit proof or documentation required to claim points for specific goals will not be allocated the points claimed.

12.6.3 Pricing Proposal

Below is an illustrative table for pricing assumptions.

Cost Item	Description	Amount (ZAR, VAT Incl)
Professional Fees	Design and delivery of Training of Trainers programme	
Facilitation Fees	Facilitation of ToT sessions (number of days/sessions as per TOR)	
Training Material Review & Amendments	Review, adaptation, and amendment of existing HRME materials (facilitator and participant manuals)	
Preparation & Assessment	Preparation time, pre- and post-training assessments	
Reporting & Close-out	Compilation and submission of final training report	
Other Direct Costs (Specify)	Any other costs directly related to delivery (excluding IHPS responsibilities)	
TOTAL LUMP-SUM PRICE		R

12.6.3.1 Pricing Basis

Bidders are required to submit a total lump-sum financial proposal for the delivery of the assignment in accordance with the ToR.

The financial proposal must cover all professional fees and costs directly related to the delivery of the assignment, excluding items explicitly stated as the responsibility of IHPS.

Note: IHPS will be responsible for the booking and payment of flights, accommodation, venue hire, and car hire. These costs must not be included in the financial proposal. Where the bidder utilises their own vehicle for approved travel related to the assignment, reimbursement will be made at the SARS tax-free reimbursive rate of R4.95 per kilometre.

12.7 Validity Period

All submitted proposals shall remain valid for a minimum of three (3) months or 90 calendar days from the closing date of submission.

12.8. Submission and Responsiveness

- Bidders are required to submit one (1) hard copy and one (1) electronic copy of the bid documents. The electronic copy must be in PDF format and submitted on a USB device, prepared in accordance with the instructions below. The signed original hard copy of the bid document will serve as the legal bid document. All pages in the bid submission must be initialled.
- Where certified copies of documents are required, the person certifying such documents must not be associated with the Bidder in any way.
- All bid documents must be submitted on or before the closing time of the bid (date and hour specified in the bidding documents).
- Incomplete bids will be deemed non-responsive.
- It is the responsibility of the bidder to ensure that the USB device is free from viruses and contains all required bid documents. The bidder must further ensure that all documents are submitted in PDF format and are accessible and capable of being opened by IHPS.

12.9 Special Conditions

- All international companies that intend to apply for this bid must apply through a South African-registered company that is compliant with all South African laws. In addition, all international companies must have local presence and physical offices that will be visited during the evaluation process in South Africa.
- IHPS and NDoH reserve the right to award according to the most economical service option submitted.
- IHPS and NDoH reserve the right to stop the contract partly or, temporarily or indefinitely, in which event neither claim nor liability whatsoever shall lie against IHPS due to non-compliance, non-performance, by the Service Provider.
- IHPS and NDoH reserve the right to not make an award.
- IHPS and NDoH reserve the right to conduct price negotiations, where deemed necessary.
- All Service Providers are bound to protect the confidentiality of all data (including the protection of personal information) and information gathered and accessed through the work on assignment. Information and data received and accessed through this project may only be used to meet the objectives outlined in these specifications.
- IHPS and NDoH reserve the right to request any relevant documentation at any stage of implementation.
- All records, data and information relating to the programme are owned by IHPS and NDoH, and remain the intellectual property of IHPS and NDoH, and as such must be treated as confidential by the Service Provider.

- At the end of the contract period, the Service Provider shall make available to IHPS and NDoH a record of all the data and information relating to IHPS and NDoH to enable the new Service Provider to sufficiently and properly take on that data and information in a manner which would enable the new Service Provider to commence delivering services to IHPS and NDoH.
- IHPS and NDoH reserve the right to conduct Service Provider due diligence prior to final award or at any time during the contract period. This may include site visits if necessary.
- IHPS and NDoH reserve the right to award the contract subject to funding availability.

SBD 3.1

**PRICING SCHEDULE – FIRM PRICES
(PURCHASES)**

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

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

Name of Bidder.....	Bid Number.....
Closing Time 12:00	Closing date.....

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

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

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

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

*Delete if not applicable

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

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.

SBD 4

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.

3.5 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.

3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification 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.

3.7 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

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.

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

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

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

1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to invitations to tender:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
 - the 90/10 system for requirements with a Rand value above R50 million (all applicable taxes included).
- 1.2 The value of this bid is estimated to be below R50 million (all applicable taxes included); and therefore the 80/20 system shall be applicable.
- 1.3 Preference points for this bid shall be awarded for:
- a) Price; and
 - b) Specific goal(s).
- 1.4 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.

1.7 The company must submit ID copies of Directors and or shareholders with their bid document or quotation to substantiate points claimed. The share certificate reflecting the number of shares held by each member or director of the company to qualify for the points claimed must be submitted. The department also use the Central Supplier Database report for further verification. In case of claiming points for disability the company must submit a registered Doctor's note or document as evidence of the disability.

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 proposals, 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

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

$$P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

3.2 FORMULAE FOR DISPOSAL OF 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

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

$$Ps = 90 \left(1 - \frac{Pt - P \min}{P \min} \right)$$

Where

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

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, of 80/20 preference points 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: 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)	Percentage ownership equity (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Historical Disadvantaged Individuals	10		
Female	8		
People with Disability (Provide Proof)	2		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

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

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the Contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct.

- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
- (a) disqualify the person from the tendering process.
 - (b) recover costs, losses, or damages it has incurred or suffered as a result of that person's conduct.
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation.
 - (d) recommend that the tenderer or contractor, its shareholders, and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE

.....
DATE

.....
POSITION

.....
NAME OF BIDDER