



health

Department:
Health
REPUBLIC OF SOUTH AFRICA



REQUEST FOR THE SUBMISSION OF QUOTATIONS (RFQ)

1. INVITATION TO QUOTE

The National Department of Health (NDoH) hereby invites suitably qualified and experienced Service Providers terms of reference for the assessment of the performance of the council for medical schemes for the imposition of levies

Description	REQUEST FOR QUOTATIONS FOR TERMS OF REFERENCE FOR THE ASSESSMENT OF THE PERFORMANCE OF THE COUNCIL FOR MEDICAL SCHEMES FOR THE IMPOSITION OF LEVIES
Reference Number	DOH 319-2026/2027
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Briefing Session	NONE
Contact Person	Email: purchasing@health.gov.za

TERMS OF REFERENCE FOR THE ASSESSMENT OF THE PERFORMANCE OF THE COUNCIL FOR MEDICAL SCHEMES FOR THE IMPOSITION OF LEVIES

1. PURPOSE AND BACKGROUND

1.1. To provide the Terms of Reference for the assessment of the performance of the Council for Medical Schemes (CMS) for the imposition of levies in accordance with the provisions of the Council for Medical Schemes Levies Act (Act No. 58 of 2000) ("the Levies Act").

1.2. This Terms of Reference document is designed to ensure that the performance assessment of CMS is comprehensive, objective, and aligned with the goal of informing the reimposition of the CMS levy, ensuring the CMS's continued effectiveness in regulating the medical schemes industry.

1.3. The CMS is a regulatory body classified as a Schedule 3A Public Entity in terms of the Public Finance Management Act, 1999 (Act No. 1 of 1999) to oversee the medical schemes industry. Its primary role is to ensure that medical schemes and other regulated entities operate in a manner that is fair, transparent, and in compliance with the applicable laws and regulations. The CMS was established in terms of the Medical Schemes Act, 1998 (Act No. 131 of 1998), and it operates under the Ministry of Health.

1.3.1. The key functions of the CMS include:

1.3.1.1. **Regulation and Supervision:** The CMS ensures that medical schemes are financially viable and that they provide benefits in line with the law. It monitors their operations, performance, and financial health to ensure that they meet the necessary legal standards.

1.3.1.2. **Consumer Protection:** The CMS aims to protect members of medical schemes by ensuring that they are provided with adequate health coverage and that their rights are respected. It does this by enforcing regulations, investigating complaints, and ensuring schemes are transparent about their benefits and costs.

1.3.1.3. **Policy Development and Advice:** The CMS plays a role in advising the government on policy and legislative matters related to the medical schemes industry and the broader health sector.

1.3.1.4. **Research and Education:** The CMS engages in research and educational initiatives aimed at improving the understanding of medical schemes and the healthcare system.

1.3.1.5. **Resolving Complaints:** The CMS provides a platform for resolving disputes between medical scheme members and their schemes, often acting as an intermediary in resolving complaints related to claims or benefits.

1.3.2. In addition to these functions, the CMS also sets standards for medical scheme practices, ensures the implementation of benefits like the **prescribed minimum benefits (PMBs)**, and promotes the overall effectiveness of the healthcare financing system.

1.4. **The Council for Medical Schemes Levies Act**

1.4.1. The **Council for Medical Schemes Levies Act** (Act No. 58 of 2000) ("the Levies Act") was enacted to provide for the imposition of levies on medical schemes to fund the activities of the CMS. The primary purpose of the Act is to ensure that the CMS has the financial resources it needs to effectively carry out its regulatory and supervisory functions in the medical schemes industry, including:

1.4.1.1. **Funding the Operations of CMS:** The levies collected under this Act funds the CMS's operations, including its regulatory, supervisory, and consumer protection functions. This ensures that the CMS has the resources to monitor medical schemes, investigate complaints, enforce compliance, and develop policies.

1.4.1.2. **Financial sustainability of the CMS:** By imposing levies on medical schemes, the Act ensures that the CMS has a stable and continuous stream

of funding, which is essential for its ongoing work in overseeing the medical schemes sector.

1.4.1.3. **Ensuring Fair and Transparent Industry Oversight:** The Act supports the CMS in its mandate to regulate medical schemes in a manner that promotes fairness, transparency, and the protection of medical scheme members' interests. It ensures the CMS effectively oversees medical schemes and other regulated entities' compliance with applicable laws and regulations.

1.4.1.4. **Promoting Effective Consumer Protection:** The funding from the levies enables the CMS to protect the interests of medical scheme members by providing avenues for complaints, resolving disputes, and ensuring that schemes comply with regulations designed to safeguard consumer rights.

1.4.2. Section 5 of the Levies Act addresses the imposition of levies on medical schemes and details on how these levies are managed over time. Accordingly, it is indicated that the levy imposed by the Minister (following due processes) will lapse after five years after the day it was introduced. This means that the imposition of the levy is not permanent and must be reconsidered after five years. The five-year period allows for periodic review, ensuring that the levy remains appropriate, reasonable, and necessary for the ongoing operations of the CMS.

1.4.3. Furthermore, an assessment of the performance of the CMS as set out in section 6 of the Levies Act must be commissioned by the Minister and be considered before approving the levy reimposition for meeting the general administrative and other costs of the CMS and the functions performed by the Registrar of the Medical Schemes.

1.4.4. In essence, the Levies Act provides the legal foundation for the CMS to impose and collect levies from medical schemes, ensuring that the Council can fulfil its role in regulating and overseeing the medical schemes industry.

2. OBJECTIVE OF THE ASSESSMENT OF THE CMS PERFORMANCE

2.1.1. In terms of Section 6 of the Levies Act, the assessment of the performance of the CMS is an important part of the levy imposition process. The assessment in this context will focus on the following:

2.1.1.1. Evaluation of the CMS's Activities and Impact:

- Review of the CMS's effectiveness in carrying out its core functions such as regulating the medical schemes industry, ensuring financial sustainability, protecting consumers, and promoting the overall health system.
- This includes looking at the CMS's success in overseeing medical schemes, enforcing compliance with regulations, and protecting the interests of scheme members.

2.1.1.2. Financial Performance:

- The financial performance of the CMS, including how levies are being used, will be assessed. This ensures that the funds collected from medical schemes are being spent efficiently and for the intended purpose of supporting the regulatory functions of the CMS (assess the efficiency of resource use, including financial, human, and other operational resources)

2.1.1.3. Effectiveness in Regulatory Functions:

- Evaluate how CMS complaints, disputes, and compliance oversight.
- Focus on how CMS is effectively managing the medical schemes sector, including addressing complaints, resolving disputes, and ensuring that medical schemes meet the necessary legal standards and provide appropriate benefits to their members.

2.1.1.4. Review of Levy Adequacy:

- Evaluate whether the evaluate whether the current levy is adequate to cover the CMS's costs. If the CMS's performance has improved or if its operational needs have changed, the levy amount and structure may be

reconsidered. This review could lead to adjustments or renewals of the levy for another period.

- In essence, determine if the current levy sufficiently cover CMS costs, considering performance and operational needs.

2.1.2. The assessment of performance under Section 6 essentially involves an evaluation of how well the CMS is achieving its regulatory and consumer protection goals. The results of this performance assessment will influence decisions about whether to continue or adjust the levy after the five-year period, ensuring that the levy remains aligned with the needs of the CMS and the medical schemes industry.

3. SCOPE OF WORK

3.1. The performance assessment will cover the following areas:

3.1.1. Mandate and Governance:

- Review CMS's strategic and annual performance plan's alignment with its legal mandate and overall governance structure – assess whether target setting and performance measures align with mandatory requirements.
- Evaluate the independence and accountability of CMS's governance mechanisms.

3.1.2. Operational Performance:

- Assess CMS's capability to oversee and regulate the medical schemes industry in compliance with the MSA.
- Examine its processes for registering, monitoring, and ensuring compliance with medical schemes.
- Review CMS's activities in terms of improving access, affordability, and quality of healthcare.
- Benchmarking against comparable regulatory bodies within the health or financial sector.

3.1.3. Financial Management:

- Review CMS's budget and financial management processes.
- Assess the efficiency of resource allocation to various programs and functions.
- Evaluate the financial sustainability of CMS, including the adequacy of its funding mechanisms, the management of the levy, and explore/propose other revenue generating mechanisms.

3.1.4. Impact and Outcomes:

- Analyze the outcomes of CMS's regulatory efforts, including improvements in consumer protection, scheme stability, and overall sector performance (accessibility of CMS services to the general public).
- Assess CMS's contributions to the healthcare system, particularly in terms of equitable access to quality healthcare.

3.1.5. Stakeholder Engagement:

- Evaluate CMS's engagement with key stakeholders, including the public, healthcare providers, and medical schemes.
- Assess CMS's communication strategies, transparency, and responsiveness to public concerns.

3.1.6. Human Resources and Capacity:

- Review the capacity and capability of CMS's human resources to fulfill its mandate.
- Evaluate the adequacy of training, skills development, recruitment and retention strategies within the organization.

3.1.7. Technology and Infrastructure:

- Assess the adequacy of CMS's technological infrastructure in supporting its operations and the medical schemes industry.
- Review CMS's digital transformation and its ability to adapt to changing technological trends.
- Review of CMS's cybersecurity capability, and integration with National Health Information System

3.1.8. Risk Management:

- Identify potential limitations in data access and Stakeholder responsiveness.
- Identify mitigation strategies to safeguard deliverables and timelines.

4. METHODOLOGY

4.1. The assessment will be conducted through a combination of the following methods:

- **Document Review:** Review of relevant reports, financial statements, regulatory frameworks, and previous performance evaluations.
- **Interviews:** Structured interviews with key stakeholders, including CMS leadership, staff, medical scheme representatives, and other government bodies.
- **Surveys:** Survey of stakeholders such as medical scheme members, healthcare providers, and industry experts.
- **Benchmarking:** Comparison of CMS's performance with similar regulatory bodies in the healthcare sector.
- **Data Analysis:** Analysis of key performance indicators, financial data, and impact metrics.

5. DELIVERABLES

5.1. The following deliverables will be produced as part of the performance assessment:

- **Inception Report:** A detailed report outlining the methodology, scope, and timeline for the assessment.
- **Draft Assessment Report:** A draft report including findings, analysis, and preliminary recommendations.
- **Final Assessment Report:** A comprehensive report with findings, conclusions, and recommendations regarding the CMS levy reimposition. This will include

specific recommendations for levy adjustments, based on the assessment of CMS's performance.

- **Presentation to Stakeholders:** A presentation summarizing the key findings and recommendations to the Department of Health, National Treasury and the CMS.

6. TIMELINE

- 6.1. The performance assessment is expected to take a period of **three to four months** from inception to the final report. Key milestones include:
- **Inception phase:** 2 weeks
 - **Data collection and analysis:** 6 weeks
 - **Draft report preparation:** 2 weeks
 - **Stakeholder feedback and final report:** 2 weeks

7. TEAM COMPOSITION

- 7.1. The performance assessment team will comprise experts with experience in healthcare regulation, financial management, governance, and performance evaluation. The team may include:
- Lead consultant/project manager
 - Healthcare regulation expert
 - Financial and governance analyst
 - Stakeholder engagement specialist
 - Data analyst

8. BUDGET AND RESOURCES

- 8.1. The budget for the performance assessment will cover:
- Consultant fees
 - Travel and logistics (if applicable)
 - Survey and data collection tools
 - Report preparation and printing costs
 - Any other administrative expenses related to the assessment

9. APPROVAL AND OVERSIGHT

- 9.1. The Terms of Reference and the final assessment will be approved by the Minister of Health with the concurrence of the Minister of Finance.
- 9.2. The assessment will be conducted under the supervision of a steering committee which will include representatives from the NDoH and the National Treasury to ensure transparency, adherence to objectives, and quality assurance.

10. CONFIDENTIALITY AND ETHICS

- 10.1. All information collected during the performance assessment will be treated with the utmost confidentiality. The assessment team will adhere to ethical standards, including ensuring the unbiased and independent evaluation of CMS's performance.

11. EVALUATION CRITERIA

- 11.1. As part of the normal procurement process, the evaluation process will be conducted according to the following stages:

Stage 1: Administrative requirements:

Quotations will first be evaluated for compliance with the administrative requirements stipulated in this RFQ.

Bidders must submit:

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

Stage 2: Technical/Mandatory evaluation.(if applicable)

Stage 3: Functionality evaluation.

Responsive quotations will thereafter be evaluated on functionality using the criteria and weights specified below. Service providers must achieve a minimum functionality score of 70 points out of 100 to qualify for further evaluation. Service providers that fail to achieve the minimum functionality threshold will not be evaluated further on price and preference points system.

The following are the evaluation criteria to be applied in this RFQ.

Bid scoring guidelines

Assessment	Description	Score
Excellent	Exceeds the required standard. Response answers the question with precision and relevance. Includes improvement through innovation and added value. Definite capacity to deliver the service	5
Good	Meets the standard required. Comprehensive response in terms of detail and relevance to the question. Likely capacity to deliver the service.	4
Acceptable	Meets the required standard in most aspects but fails in some areas. Acceptable level of details, accuracy, and relevance. Likely capacity to deliver the service	3
Limited	Fails the required standard in most aspects but meets some. Limited information / inadequate/only partially addresses the question. Questionable capacity to deliver the service	2
Inadequate	Significantly fails to meet the required standard. Inadequate detail provided / questions not answered/answers not directly relevant to the question. Unlikely capacity to deliver the service	1
Not Eligible for consideration	No relevant evidence is attached for evaluation purposes.	0

No.	Criterion	Evidence Required	Scoring	Weight
1	Entity track record	Signed reference letters with contactable details demonstrating completed projects or similar assignments. The letter must indicate the nature of work done, and the contracted amount and this may be supported with purchase order (s) or appointment letter (s) or service level agreement (s). Failure to submit letters that don't adhere to the guidelines indicated above will lead to the service provider scoring a zero.	0: No relevant projects demonstrated. 1: 1 relevant project. 2: 2 relevant projects. 3: 3 relevant projects. 4: 4 relevant projects. 5: 5 or more relevant projects.	25
2	Experience and qualifications of the proposed team	Signed CVs and copies of relevant qualifications for the proposed project lead and key specialists. The team should demonstrate capability in the specialist areas identified in the TOR.	0: No relevant team/CVs submitted. 1: Only 1 required specialist area adequately covered. 2: 2 required areas adequately covered. 3: 3 required areas adequately covered. 4: 4 required areas	30

No.	Criterion	Evidence Required	Scoring	Weight
			adequately covered. 5: All 5 required areas adequately covered.	
3	Methodology and approach	Detailed methodology demonstrating how the bidder will undertake document review, interviews, surveys, benchmarking, data analysis and stakeholder engagement.	0: No methodology. 1: Poor/inadequate methodology. 2: Partially addresses requirements. 3: Adequately addresses all major requirements. 4: Comprehensive and well-structured methodology. 5: Highly comprehensive methodology demonstrating strong understanding and clear linkage to outputs.	25
4	Project plan and timelines	Project plan/work plan showing activities, milestones, responsibilities and delivery periods aligned with the required three-to-four-month timeframe.	0: No project plan. 1: Substantially inadequate/unrealistic. 2: Basic plan with significant gaps. 3: Adequate and achievable plan aligned with the required timeframe. 4: Detailed and well-sequenced implementation plan. 5: Comprehensive plan with clear milestones, responsibilities, dependencies and risk mitigation measures.	20
TOTAL				100

One individual may cover more than one specialist area, provided that the bidder demonstrates through the submitted signed CV and qualifications that the individual possesses the relevant competence and experience.

NB: The Department reserves the right to verify any information, qualifications, experience and references submitted by bidders.

Stage 4: 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 pricing **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.

12. SUBMISSION INSTRUCTIONS

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

SUBMISSION DUE DATE AND TIME: 16 OCT 2026 @ 11 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.

For any queries or clarifications, please respond directly to the sender of this RFQ using the email address from which you received it.

13. ENQUIRIES

All enquiries related to this bid must be directed to:

purchasing@health.gov.za

No late or telephonic submissions will be accepted.

14. 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.

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.

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.

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Full Name	Identity Number	Name of institution	State

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**

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.

² Joint venture or Consortium means an association of persons for the

SBD4

- 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 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

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 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	
B-BBEE STATUS LEVEL OF CONTRIBUTOR	
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

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{min} = Price of lowest acceptable bid

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

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

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

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

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

.....

.....

PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: BID NO: **DOH 319-2026/2027**

CLOSING TIME **11:00 AM**

CLOSING DATE: **16 OCTOBER 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)