



state security

State Security Agency
REPUBLIC OF SOUTH AFRICA

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (STATE SECURITY AGENCY)					
BID NUMBER:	SSA/25/2023-24	CLOSING DATE:	14 May 2024	CLOSING TIME:	11:00
BRIEFING SESSION (COMPULSORY/ NON COMPULSORY)	COMPULSORY				
BRIEFING DATE AND TIME	23 April 2024 @11:00 am				
DESCRIPTION:	PHARMACEUTICAL BENEFIT MANAGEMENT (PBM) SERVICE PROVIDER FOR A FIVE (5) YEAR PERIOD				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
SSA HEADQUARTERS RECEPTION					
MUSANDA COMPLEX					
1 JOE NHLANHLA STREET					
PRETORIA					
0181					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:					
CONTACT PERSON	Ms. Nobantu Mogotsi				
TELEPHONE NUMBER	+27 (12) 427 4174				
E-MAIL ADDRESS	nobantum@ssa.gov.za				
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					

CONTRACT PERSON					
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
TOTAL BID PRICE Inc. VAT					
SUPPLIER COMPLIANCE STATUS		TAX COMPLIANCE SYSTEM PIN:	OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE		TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT [TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
[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 [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO					
DOES THE ENTITY HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO					
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO					
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO					
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <input type="checkbox"/> YES <input type="checkbox"/> NO					
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.					

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 IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. 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 SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

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 VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

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DEFINITIONS

The rules of interpretation and defined terms contained in the General Conditions of Contract (GCC) shall apply to this invitation to bid unless the context requires otherwise.

In addition the following terms used in this invitation to bid shall, unless indicated otherwise, have the meanings assigned to such terms in the table below.

SSA	State Security Agency.
Invitation to bid	Invitation to bid comprising: <ul style="list-style-type: none">○ The cover page and the table of content and definitions○ Part 1 which details the Conditions of Bid○ Part 2 which details the Terms of Reference relating to the service○ Part 3 which contains all the requisite bid forms and certificates; As read with GCC – General Conditions of Contract
Services	Defined services on the cover page of this invitation to bid and described in detail in the Terms of Reference;
Specifications /Terms of Reference	Specifications or terms contained in Part 2 of this invitation to bid;

Part 1

Conditions of Bid

1. BACKGROUND AND INTRODUCTORY PROVISIONS

Refer to Part 2 of this invitation to bid for background and introductory information relating to the Services and this invitation to bid.

2. OFFER AND SPECIAL CONDITIONS

2.1 Without detracting from the generality of clause below, bidders must submit a completed and signed and requisite bid forms attached as Part 3 with its bid. Bidders must take careful note of the conditions of award.

2.2 **All bids submitted in reply to this invitation to bid should incorporate all the forms, parts, certificates and other documentation forming part of this invitation to bid, duly completed where required.**

2.3 **It is a requirement that Tax matters of a service provider must be complaint with SARS when submitting, during and at the award of this tender.**

2.4 In the event that any form or certificate provided in Part 3 of this invitation to bid does not have adequate space for the bidder to provide the requested details, the bidder should attach an annexure to such form or certificate on which the requested details should be provided and the bidder should refer to such annexure in the form or certificate provided.

3. CLOSING TIME OF BIDS AND PROVISIONS RELATING TO SUBMISSION OF BIDS

3.1 The closing date and time for the receipt of bids in response to this invitation to bid is detailed on the cover page of this invitation to bid.

3.2 All bids must be submitted in a sealed envelope bearing the bid number, bid description and closing date.

3.3 All bids must be deposited before the closing time and date stipulated above in the bid box at the address detailed on the cover page of this invitation to bid.

4. ENQUIRIES

Should any bidder have any enquiries relating to this invitation to bid, such enquiries may only be addressed to the person/s detailed on the cover page to this invitation to bid at the number/s stipulated. Bidders are given until two (2) days before the closing date to forward enquiries regarding the tender.

5. COMPULSORY BID BRIEFING/SESSION

There is compulsory briefing session for this tender

6. TAX CLEARANCE

The bidder should have compliant tax matters with SARS when submitting bid documentation. A pro forma application for Tax Clearance Certificate (SBD 2) is attached as Part 3 – Schedule B. Bidder must take specific note of the conditions stipulated in SBD 2. Tax clearance certificate and B-BBEE certificate must be renewed every 12 months and must be submitted to Supply Chain Management.

7. PRICING

7.1 The bidder(s) must submit details regarding the bid price for the Services on the Pricing Schedule form/s attached as Part 3 – Schedule C which completed form/s must be submitted together with the bid documents.

7.2 Pricing stipulated must be **INCLUSIVE OF VALUE ADDED TAX**.

7.3 It is an express requirement of this invitation to bid that the bidders provide some transparency in respect to their pricing approach. In this regard, bidders must indicate the basis on which they have calculated their pricing by completing all aspects of the Pricing Schedule form Part 3 – Schedule C.

7.4 The total price including VAT should be transferred to SBD1.

8. DECLARATION OF INTEREST

The bidder should submit a duly signed declaration of interest (SBD 4) together with the bid. The declaration of interest is attached as Part 3 – Schedule D.

9. QUALIFICATIONS OF BIDDERS

Bidders must submit detailed information together with their bid and disclose the experience in the relevant trade together with present contracts. These details should be submitted together with the bid on the form attached as Part 3 – Schedule E.

10. PARTNERSHIPS AND LEGAL ENTITIES

In the case of the bidder being a partnership, close corporation or a company all certificates reflecting the names, identity numbers and address of the partners, members or directors (as the case may be) must be submitted with the bid. These details should be submitted on the form attached as Part 3 – Schedule G.

11. CONSORTIUM / JOINT VENTURE

11.1 It is recognized that bidders may wish to form consortia to provide the Services.

11.2 A bid in response to this invitation to bid by a consortium shall comply with the following Requirements:-

11.2.1 It shall be signed so as to be legally binding on all consortium members;

- 11.2.2 One of the members shall be nominated by the others as authorized to be the lead member and this authorization shall be included in the agreement entered into between the consortium members;
- 11.2.3 The lead member shall be the only authorized party to make legal statements, communicate with the SSA and receive instructions for and on behalf of any and all the members of the consortium;
- 11.2.4 A copy of the agreement entered into by the consortium members shall be submitted with the bid;
- 11.2.5 Each party to the Consortium must submit a BBEE Status Level Verification certificate;
- 11.2.6 Each party to the Consortium must be tax compliant with SARS;
- 11.2.7 Preference points will only be awarded when a consolidated BBEE Certificate is submitted; and
- 11.2.8 Parties should be registered on the Central Supplier Database or be willing to register on such a database.

12. ORGANISATIONAL PRINCIPLES

The bidder should submit a clear indication of the envisaged authorized organizational principles, procedures and functions for an effective delivery of the required Service. These details should be submitted on the form attached as Part 3 – Schedule H.

13. DETAILS OF THE PROSPECTIVE BIDDERS NEAREST OFFICE TO THE LOCATION OF THE CONTRACT

The bidder should provide full details regarding the bidders nearest office base in the province (see Part 3 of this invitation to bid). These details should be provided on the form attached as Part 3 – Schedule I, which completed form must be submitted together with the bid.

14. FINANCIAL PARTICULARS

Bidder must provide full details regarding its financial particulars and standing, which particulars should be submitted together with the bid on the form attached as Part 3 – Schedule J

15. PREFERENCE POINTS CLAIM FORMS

Part 3- Schedule K contains the Preference Points Claim Forms in terms of Preferential Procurement Regulations, 2017 to be completed and signed by the bidder to the extent applicable and returned with this bid.

16. VALIDITY

Bid documentation submitted by the bidder will be valid and open for acceptance for a period of **(150) one hundred and fifty** calendar days from the closing date and time stipulated on the front cover of this invitation to bid.

17. ACCEPTANCE OF BIDS

17.1 The SSA does not bind itself to accept either the lowest or any other bid and reserves the right to accept the bid which it deems to be in the best interest of the Department.

17.2 The SSA reserves the right to award the bid in wholly or in part thereof.

18. NO RIGHTS OR CLAIMS

18.1 Receipt of the invitation to bid does not confer any right on any party in respect of the Services or in respect of or against the SSA. The SSA reserves the right, in its sole discretion, to withdraw by notice to bidders any Services or combination of Services from the bid process, to terminate any party's participation in the bid process or to accept or reject any response to this invitation to bid on notice to the bidders without liability to any party. Accordingly, parties have no rights, expressed or implied, with respect to any of the Services as a result of their participation in the bid process.

18.2 The SSA, nor any of their respective directors, officers, employees, agents, representatives or advisors will assume any obligations for any costs or expenses incurred by any party in or associated with any appraisal and/or investigation relating to this invitation to bid or the subsequent submission of a bid in response to this invitation to bid in respect of the Services or any other costs, expenses or liabilities of whatsoever nature and howsoever incurred by bidders in connection with or arising out of the bid process.

19. NON DISCLOSURE, CONFIDENTIALITY AND SECURITY

19.1 The invitation to bid and its contents are made available on condition that they are used in connection with the bid process set out in the invitation to bid and for no other purpose. All information pertaining to this invitation to bid and its contents shall be regarded as restricted and divulged on a "need to know" basis with the approval of the SSA.

19.2 In the event that the bidder is appointed pursuant to this invitation to bid such bidder may be subject to security clearance prior to commencement of the Services.

20. ACCURACY OF INFORMATION

20.1 The information contained in the invitation to bid has been prepared in good faith. The SSA nor any of their respective directors, advisors, officers, employees, agents, representatives make any representation or warranty or give any undertaking express or implied, or accept any responsibility or liability whatsoever, as to the contents, accuracy or completeness of the information contained in the invitation to bid, or any other written or oral information made available in connection with the bid and nothing contained herein is, or shall be relied upon as a promise or representation, whether as to the past or the future.

20.2 This invitation to bid may not contain all the information that may be required to evaluate a possible submission of a response to this invitation to bid. The bidder should conduct its own independent analysis of the operations to the extent required to enable it to respond to this bid.

21. COMPETITION

21.1 Bidders and their respective officers, employees and agents are prohibited from engaging in any collusive action with respect to the bidding process which serves to limit competition amongst bidders.

21.2 In general, the attention of bidders is drawn to Section 4(1) (iii) of the Competition Act 1998 (Act No. 89 of 1998) (the Competition Act) that prohibits collusive bidding.

21.3 If bidders have reason to believe that competition issues may arise from any submission of a response to this bid invitation they are encouraged to discuss their position with the competition authorities before submitting response.

21.4 Any correspondence or process of any kind between bidders and the competition authorities must be documented in the responses to this invitation to bid.

21.5 Part 4 (Schedule F) should be completed and duly signed.

22. RESERVATION OF RIGHTS

22.1 Without limitation to any other rights of the SSA (whether otherwise reserved in this invitation to bid or under law), the SSA expressly reserves the right to:-

22.1.1 Request clarification on any aspect of a response to this invitation to bid received from the bidder, such requests and the responses to be in writing;

22.1.2 Amend the bidding process, including the timetables, closing date and any other date at its sole discretion; and

22.2 Reject all responses submitted by bidders and to embark on a new bid process.

23. SECURITY REQUIREMENTS

23.1 **Security clearances:** The bidder's (principal or joint venture contractor) employees and sub Bidders **are** required at all times during the contract period to be in possession of valid security clearances to the level determined by SSA commensurate with the nature of the project activities they are involved in. The cost of obtaining suitable clearances is for the account of the bidders.

23.2 The vendors shall supply and maintain a list of personnel involved on the account indicating their clearance status. Negative or failure of security clearance or vetting by the bidder bidder's employees or partners at any stage during the contracting or contract period and lack of or inability to obtain acceptable replacements by the contractor may lead to the cancellation of the contract. The Bidders and their sub-Bidders will be re-vetted for every event during the period of contracting.

PART 2

SPECIFICATIONS

PHARMACEUTICAL BENEFIT MANAGEMENT (PBM) SERVICE PROVIDER FOR A FIVE (5) YEAR PERIOD

1 INTRODUCTION

- 1.1 The Optimum Medical Scheme (OPMED) is a self-administered in-house Medical Scheme. It is managed as a service benefit for OPMED members. The Scheme has to adhere to Government policies, procedures, applicable Health Regulations and clinical protocols in order to ensure a close tender process to be followed to appoint an accredited and experienced Pharmaceutical Benefit Management (PBM) service provider.

2 BACKGROUND

- 2.1 OPMED is guided by the requirements of the Medical Schemes Act (MSA), No 131 of 1998 despite exemption from the application of the Act.
- 2.2 The Scheme is responsible for the administration of all functions within the medical schemes environment. The OPMED Management Control Board (OMCB) is an internal representative governance body responsible for corporate governance.

3. OBJECTIVE

- 3.1 The purpose of this invitation is to appoint potential experienced and accredited PBM service provider who can deliver a comprehensive solution to OPMED.

4. SCOPE OF WORK

- 4.1 The bidder is required to provide a comprehensive technical solution. This section is dedicated to better understand the service provider's proposed solution on how the services will be provided to customers and the methodologies implemented to ensure the agreed service level parameters are met.
- 4.2 Bidders are required to provide a plan (methodology) on how the supply and services will be provided or undertaken.
- 4.3 It is the intent of this Term of reference (TOR) to acquire a Pharmaceutical Benefit Management service provider capable of supplying a real-time processing of medicine claims 24 Hours, 7 Days a week, 365 days per year, uninterrupted operation.
- 4.4 The section below indicates the minimum contractual requirements and the respondent must include all required contractual and costing information to ensure a complete solution.

4 Technical Proposal

This part must contain at least the following:

- (i) Covering letter signed by the Service Provider, *inter alia*:
- Accepting the Rules of Bidding, Evaluation of Bids, and Bid Evaluation Criteria set out in the Terms of Reference;
 - The Bidder needs to indicate to us that he is responding as a Prime contractor, joint venture, consortium or partnership and list the parties concerned.
 - Providing full contact details for the Service Provider and whether it is a member of an association of practitioners in events management (if applicable), if so, name of association and area where headquarters is situated.
 - The name, facsimile and Telephone number of the Accounts Executive or Project Coordinator who will be in direct contact with OPMED regarding the accounts (& modus operandi/procedures), an indication of his experience in SAP processes and the extent of his language competencies.
 - The following statement must be included in the letter:
 - *[We hereby certify that all statements made with regard to this proposal are made by [enter name of applicant here] are accurate and factual, and that we are aware that OPMED reserves the right to verify any information provided in this regard and that untrue statements may result in the proposal being declared non-compliant].*
- (ii) Information on and motivation for the Service Provider, attaching his/her curriculum vitae, and setting out his/her personal, and his/her firm's:
- Suitability for this assignment;
 - Relevant skills and experience. For each relevant experience cited, outline the precise role the lead Provider played, the role of the firm, contract duration, contract outcomes, and contract value
 - Availability to perform the work. This must be substantiated by listing the lead Provider's other known professional commitments for the forthcoming year, substantiate this in view of ability/capacity to carry out OPMED's account.
 - The BEE shareholder equity in the lead Service Provider Company.
 - Provide an overview of the operating structure and geographical locations of the firm at the national.
 - Examples of three (3) typical related contracts should be submitted.
 - A detailed outline of the modus operandi and the handling, operation and servicing of the project/contract must be furnished.
 - An indication of the extent of the infrastructure and capacity to handle the entire contract or part thereof.
 - Relevant skills and experience. For each relevant experience cited, outline the precise team member's service provider's role played in the project handled by this contractor. Three (3) (at the most) of references (copies) should be submitted.

- Actual “accounts” handled by this contractor with specific reference accounts management. (Full clients’ lists).
 - Availability to perform the work. Listing the Service Provider’s other known professional commitments for the forthcoming 2 years must substantiate this in view of ability/capacity to carry out OPMED’s account.
 - Standards – Include information regarding your firm’s utilization of widely known Industry Standards and guidelines, as they apply to your firm, your firm’s proposal.
 - Corporate Financial Status - Audited financial statements from the most recent financial year.
 - Indicate the percentage of total annual revenue that the proposed service generated for the most recent.
- (iii) The BEE proposal, setting out: Names and BEE status of all proposed team members, and their firms, setting out:
- The professional and leading role that each person will play in the assignment. This must be cross-referenced to each deliverable set out in this Terms of Reference;
 - The suitability of each person for the proposed roles in terms of their relevant skills and experience;
 - Their availability to perform the work;
 - One-page résumés (CV’s) of each person highlighting responsibilities held for experience relevant to this assignment in the last 3 years.
 - A Summary matrix of the percentage of Black (HDI) South African professionals on the team, clearly showing the roles they will play in the Service Provider’s team.
 - The number of HDI professionals playing a leading or professional role on the team in the Service Provider’s company, clearly showing the roles they will play in the Service Provider’s team.
 - Skills transfer plan to OPMED and within the service provider/Joint Venture to directly benefit HDI professionals, women and people with disabilities.
 - A statement/plan indicating progress towards transformation;
 - Ownership/Equity
 - Management (% HDI’s in executive management and/or executive positions)
 - Employment equity
 - Job Creation/Youth Development
 - Skills development

- Preferential procurement
- Corporate social investment

5. Administrative Compliance of the bid documents as per the table below.

Failure to submit and sign all the documents will invalidate the bid

ESSENTIAL REQUIREMENTS				
Item No	Document that must be submitted	YES √	NO x	Comments
1	Invitation to Bid – SBD 1			
2	Schedule A – General Conditions of Contract			
3	Schedule B - Original and valid Tax Clearance Certificate as stipulated (SBD 2)			When is it expiring:
4	Schedule C - Pricing Schedules (SBD3.2)			
5	Declaration of interest – SDB 4 also submit mandatory documents			
6	Schedule E: In case of a Joint Venture, an agreement must be signed by both parties to the JV.			
7	Schedule F -Schedule - Qualifications and Experience			
8	Schedule G - Organizational Type and Structure			
9	Schedule H - Details of Bidder's nearest office (Schedule H)			
10	Schedule I – Financial Particulars latest audited financial statements			
11	Schedule J – Preferential Claim form (SBD 6.1) B-BBEE Certificate			
12	Schedule K – Security Clearance Requirements (SBD0)			
13	Registration on Central Supplier Database (CSD). In case of a/joint Venture arrangement, all Bidder(s) members must also submit all the mandatory documents			CSD Registration No; MAAA_____
14	On CSD: In case of Joint Venture arrangement, all Bidder(s)/members must also submit tax compliance status			
18	Pricing Schedule			

6. EVALUATION CRITERIA

6.1. Stage 1: MANDATORY REQUIREMENTS

Failure to comply with all mandatory requirements will invalidate the bid

7.1 MANDATORY REQUIREMENTS			
	Comply	Do not Comply	Detail of offer/proposal or proof can be provided on a separate sheet
Accredited Pharmaceutical Benefit Management (PBM) service provider in terms of regulation 15 of the regulations promulgated in terms of the Medical Schemes Act 131 of 1998 (Proof to be provided)			
Minimum of 5 years' accreditation of a PBM			
List 10 medical scheme clients with the total of lives to be managed			
<p>An integrated list of service that covers the total spectrum of medicine claims administration (processing) real-time:</p> <p>Data switching services</p> <p>Data integrity validation (list standards applied per line transaction)</p> <p>Gate keeping services</p> <p>Eligibility services include:</p> <ul style="list-style-type: none"> - Membership number as per membership card - Membership number requirements - Dependant code as per membership card - Dependant date of birth - Dependant's gender (male/female) - Valid practice number of the prescriber <p>Utilisation management services include:</p> <ul style="list-style-type: none"> - Quantity checks per item or unit - Fills limitation - Days of supply - ICD-10 Diagnostic code - 9 Digit nappi code of medicine dispensed <p>Clinical management services (list standards applied per transaction)</p> <p>Price and product file management</p>			

Benefit management Medicine management (authorisation services) of: Prescribed Minimum Benefits (PMB); Chronic Disease List (CDL) excluding Diabetes; Non CDL (excluding HIV/AIDS), and biological medicine Validation of generic or therapeutic substitution including an SMS message for cheaper alternatives Oncology management Management of day-to-day appliances Management of medical appliances List negotiations with Pharmacy Networks			
Stable technology platform (98% uptime)			
Processing of medicine claims should also include : - registered dispensing doctors - paper claims - real-time claims (daily batches) - all disciplines with code 0201			
Contingency plan			

7. Stage 2: – Compliance to Specifications Failure to comply will be invalidate the bid

	Comply	Do not Comply	Detail of offer/proposal
Formulary design and management (List services)			
Paper audit (Fraud management) on request from OPMED			
Payments to pharmacies			
Reporting (List, frequency and example(s))			
Impact studies			
Advisory service			
Managed care service (List and define alternative options)			
List client support to OPMED			
List the services offered by your Call Centre/Helpdesk to OPMED			
Call Centre/Helpdesk hours			

8. Process requirements

Indicate your total claim process flow between “switch”, PBM and OPMED
Include project plan / work schedule for implementation

9. Contract requirements

Attach template of proposed contract with OPMED
Terms of contract <ul style="list-style-type: none">- Confidentiality clause- Escape clause- Applicable penalty fees

Successful bidder(s) will be required to enter into a formal contract with OPMED. The applicant is expected to be available to commence with the contract on signing of the contract (commencement date).

OPMED expects that the project should be complete within a maximum period of four (4) months from the commencement date after signing of the contract and a positive security clearance.

10. Project comprehension and project management plan, setting out:

- I. A Project Officer will be appointed to take full responsibility for managing the service provider's work and for ensuring delivery on the project.
- II. The Project Officer will establish a Project Management Team, to regularly engage with the service provider for efficiently completing the various delivery items. The Project Management Team will meet as determined to discuss issues of mutual concern, to review the contractor's performance and to discuss improvements which the contractor or OPMED should make in order to achieve more effective event and greater savings. The representatives will further regularly engage for monitoring and evaluation of the various delivery items and contract. OPMED representative will meet as determined in the contract and the service provider will report progress on these meetings, as instructed by the Department and the Project Officer.
- III. The Project Officer will confirm that the service provider has satisfactorily completed each deliverable by the service provider before invoices can be submitted to the department for payment.
- IV. It is essential that the bidders nominate a contact person (Accounts/Contact Manager/Contract Manager/Consultant) in their bid whom OPMED could directly contact to settle problems arising from the contract or Service Level Agreement.
 - The Service Provider understanding of the ToR and any proposals for amendments to the ToR that would enhance desired outcomes, the proposal must address all the requirements of these Terms of reference. The proposal should be concise and contain information that would be necessary for presentation,

- How the Service Provider proposes to manage the set of deliverables outlined in the Terms of Reference. A brief statement of understanding of the project, expected deliverables, and relevant experience of the applicant,
- The proposal must address all the requirements of these Terms of reference. The proposal should be concise and contain information that would be necessary for presentation,
- A proposed outline Work Plan with time-table for delivery. A comprehensive implementation strategy and plan for the fulfilment of the task, indicating very clearly steps to be followed to achieve that objective,
- A brief point form of description of work programme activities that the applicant would be proposing for project execution after positive outcome of security clearances, with the project deadline of (4) four months in mind and how (effort to be put in place) this timeline will be achieved.
- An explanation of expertise and/or resources that would be used in executing the project,
- How the Service Provider's team members will be supervised,
- How reporting to the Project Officer will take place,
- Any innovative ideas for how the whole assignment can best achieve its objectives.

11. Bid Evaluation Methodology

- OPMED reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder.
- Bidders who do not submit a valid and original Tax Clearance Certificate on the closing date and time of the bid. If a Consortium or Joint Venture. Original and valid Tax Clearance Certificate must be submitted for each member.
- Bidders who submitted incomplete information and documentation according to the requirements of this Bid documentation;
- Bidders who submitted information that is fraudulent, factually untrue or inaccurate, for example memberships that do not exist, BEE credentials, experience, etc.;
- Bidders who received information not available to other bidders through fraudulent means; and/or
- Bidders who do not comply with *mandatory requirements* as stipulated in this bid, i.e. page 3 General
- Bidders who do not attend the compulsory briefing session
- Bidders who have been blacklisted as per the National Treasury database.
- A Bid Evaluation Committee will be established by OPMED comprising representatives. The committee will evaluate all bids received on or before the closing time and date, according

to the criteria indicated herein. The evaluation Committee will make a recommendation to the Bid Adjudication Committee and/or Director General for appointment of the preferred bidder.

- The Bid Evaluation Committee reserves the right to call bidders to complete any outstanding elements of their bids, make presentations of their bids, and/or present Best and Final Offers, if required.
- Evaluation will be based on a point system. The following are the maximum number of points that can be awarded for each category, and the threshold score for each category:

Category	Maximum points	Threshold score
1. Technical/Functional Proposal	100	80
2. Price	80	-
3. B-BBEE Contribution	20	-

The Technical Proposals received will be evaluated the Functional/Technical threshold Score will be **80 points** and only those bids that subsequently achieve **80 points** or more threshold will be short listed by the Evaluation Committee and their price proposals scored as follows;

Explanation of points allocated

Bid Price proposal	80 points
B-BEE Level of Indicator	20 points
TOTAL	<u>100 points</u>

In terms of regulation 4 of the preferential procurement regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive tenders will be adjudicated by the State on the 80/20-preference point system in terms of which points are awarded to bidders on the basis of:

The total highest points for price (maximum 80 points)
 B-BBEE Level of Contribution (maximum 20 points)

The bid which achieves the highest total points out of 100 will be recommended by the Bid Evaluation Committee as the preferred service provider.

12. Evaluation Criteria

The following score sheet or criteria shall apply for scoring by the evaluation committee members in scoring compliant/qualifying bids meeting the minimum requirements.

No.	1. Criteria	Scoring (for whole or each sub-element where applicable)	Maximum points
	Technical Proposal		

1	End to end Business Process (including; architecture, streamlining, analysis, implementation, evaluation and monitoring with the view to boosting workforce productivity, effectiveness).			
	Skills Qualified pharmacists with experience in pharmaceutical benefit management services (including biological medication)	<i>Poor – inadequate information</i>	3	30
		<i>Satisfactory- sufficient details</i>	7	
		<i>Good – well laid out and detailed</i>	10	
		<i>Excellent – exceptionally laid out and thoroughly detailed</i>	15	
	<i>Relevant experience: A minimum of five (5) years relevant experience</i>	<i>One to Two years</i>	3	30
		<i>Three to five years</i>	7	
		<i>Six to nine years</i>	10	
		<i>Ten years and more</i>	15	
2	Clinical knowledge and experience on Pharmaceutical Benefit Management (PBM) Include a one-page CV of each person who will be involved in the implementation of the project and the personnel who will be responsible for the managing of OPMED's matters.	<i>Poor – inadequate information</i>	3	30
	<i>Satisfactory- sufficient details</i>	7		
	<i>Good – well laid out and detailed</i>	10		
	<i>Excellent – exceptionally laid out and thoroughly detailed</i>	15		
	<i>- Relevant Skills and experience in Pharmaceutical Benefit Management</i>			30
		<i>Less than 2 years</i>	3	
		<i>Greater than 2 years but less than 5 years</i>	7	
		<i>Greater than 5 years but less than 7 years</i>	10	
	<i>Greater than 7 years</i>	15		
3.	Project Management (methodology, model and implementation). Quality of project comprehension demonstrated in the proposals. Quality of proposed Work Plan, project management approach and timetable for the project.	<i>Poor – inadequate information</i>	1	10
	<i>Satisfactory- sufficient details</i>	5		
	<i>Good – well laid out and detailed</i>	7		
	<i>Excellent – exceptionally laid out and thoroughly detailed</i>	10		
4	Customer relationship management (support and contract management). Maintains a good track record in serving the Public Sector/Government, international organizations, embassies and multinational corporations; list of corporate clients should be provided, including industry awards won if any or peer review recognition. Understanding and knowledge of Department, industry and sector requirements.	<i>One to Two years</i>	3	10
	<i>Three to five years</i>	5		
	<i>Six to nine years</i>	7		
	<i>Ten years and more</i>	10		
5	Information Communication Technologies (including, software, hardware, application requirements).	<i>Excellent =10 Acceptable =5 Poor =3</i>		10
6	Performance of the Solution: Illustrate mechanism to prove performance of the system	Very basic Quality performance plan	5	

		Workable Quality performance which is likely to result in quality work	7	10
		Comprehensive Quality performance and is most likely to result in excellent quality work	10	
	Technical Threshold Score		80	100
	TOTAL Technical points			

12.1 Evaluation in terms of Price will carry 80 points

The bid will be evaluated in terms of the 80/20 point system as stipulated in the Preferential Procurement Regulations, 2017. 80 points will be allocated for price and 20 points for attaining the B-BBEE status level of contributor.

Points for price will be calculated only for shortlisted bidder/s as follows:

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

Where

P_s = Points scored for competitive price of bid or offer under consideration;

P_t = Competitive price of bid or offer under consideration; and

P_{\min} = Competitive price of lowest acceptable bid or offer

The maximum possible score that can be achieved for price is 80 points.

Evaluation in terms of BBEE will carry 20 points

Bidders are required to, together with their bids submit original and valid B-BBEE status level verification certificates or certified copies to substantiate their B-BBEE rating claims. A bid will not be disqualified from the bidding process if the bidder does not submit a certificate substantiating the B-BBEE status level of contribution nor is a non-compliant contributor. Such a bidder will score 0 out of maximum of 20 points for B-BBEE.

Point allocation will be done as per the below table:-

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20

2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non Compliant	0

13. Sub-contracting

- (a) A bidder will not be awarded the points claimed for B-BBEE status level of contribution if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the contract value to any other enterprise that does not qualify for at least the same number of points that the bidder qualifies for, unless the intended sub-contractor is an EME that has capability and ability to execute the sub-contract.
- (b) A contractor is not allowed to sub-contract more than 25% of the contract value to another enterprise that does not have equal or higher B-BBEE status level, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.

14. Evaluation of Bid that scored equal points

- (a) In the event that two or more bids have scored the total points, the successful bid will be the ones scored the highest points for B-BBEE.
- (b) If two or more bids have equal points, including equal preference points for B-BBEE, the successful bid will be the one scoring the highest score for functionality, if functionality is part of evaluation process.
- (c) If two or more bids are still equal in all respects, then the award will be decided by drawing of lots.

General Conditions of Contract and Special Conditions of Contracts

NOTES

The purpose of this document is to:

- (i) Draw special attention to certain general conditions applicable to government bids, contracts and orders; and
- (ii) To ensure that clients be familiar with regard to the rights and obligations of all parties involved in doing business with government.

In this document words in the singular also mean in the plural and vice versa and words in the masculine also mean in the feminine and neuter.

- The General Conditions of Contract will form part of all bid documents and may not be amended.
- Special Conditions of Contract (SCC) relevant to a specific bid, should be compiled separately for every bid (if applicable) and will supplement the General Conditions of Contract. Whenever there is a conflict, the provisions in the SCC shall prevail.

NB: SEE ATTACHED GENERAL CONDITIONS OF CONTRACT

Part 3 – Schedule B

Application for Tax Clearance Certificate

TAX CLEARANCE REQUIREMENTS IT IS A CONDITION OF BIDDING:-

1. It is an absolute requirement that the taxes of the successful bidder **must** be in order or that satisfactory arrangements have been made with the Receiver of Revenue to meet his / her obligations.
2. The attached form, Application for Tax Clearance Certificate (in respect of bids), must be completed by the bidder in all respects and submitted to the Receiver of Revenue where the bidder is registered for tax purposes. That Receiver of Revenue will then furnish the bidder with a Tax Clearance Certificate that will be valid for 6 months from date of issue. This Tax Clearance Certificate must be submitted in the original together with the bid. Failure to submit an **original** and valid Tax Clearance Certificate at the time of submission of the bid **shall** invalidate the bid.
3. In bids where Consortia/ Joint Ventures /Sub-Contractors are involved each party must submit a separate Tax Clearance Certificate. Copies of the Application for Tax Clearance Certificate are available at any Receiver's Office.

APPLICATION FOR TAX CLEARANCE CERTIFICATE (IN RESPECT OF OFFERORS)

1. Name of taxpayer / bidder: _____

2. Trade name: _____

3. Identification number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

1. Company / Close Corporation registration number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

2. Income tax reference number:

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

3. VAT registration number (if applicable):

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

4. PAYE Employer's registration number

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

(If applicable)

Signature of contact person requiring Tax Clearance Certificate:

Name: _____

Telephone Number: Code: _____ Number: _____

Address: _____

DATE: ____ / ____ / ____

PLEASE NOTE THAT THE COMMISSIONER OF THE SOUTH AFRICAN REVENUE SERVICE (SARS) WILL NOT EXERCISE HIS DISCRETIONARY POWERS IN FAVOUR OF ANY PERSON WITH REGARD TO ANY INTEREST, PENALTIES AND/OR ADDITIONAL TAX LEVIABLE DUE TO THE LATE OR UNDER PAYMENT OF TAXES, DUTIES OR LEVIES OR THE RENDITION OF RETURNS BY ANY PERSON AS A RESULT OF ANY SYSTEM NOT BEING YEAR 2000 COMPLIANT.

Part 3- Schedule C

SBD 3.2

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

NOTE: PRICE ADJUSTMENTS WILL BE ALLOWED AT THE PERIODS AND TIMES SPECIFIED IN THE BIDDING DOCUMENTS.

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: <u>11:00</u>	Closing date:

OFFER TO BE VALID FOR **150** DAYS FROM THE CLOSING DATE OF BID.

ITEM NO. INCLUDED)	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES
--------------------	----------	-------------	--

Price/ Remuneration Proposal

Cost
Fixed administration fee per principal member per month (inclusive of vat)
Fixed fee per chronic patient management per month (inclusive of vat)
Fee payable to the switching service provider
Pharmacy network(s)
SMS facility for alternative cheaper medicine
Any cost during the implementation phase
Total cost
Formulary design and management (List services)
Price and product file management
Paper audit (Fraud management) <ul style="list-style-type: none"> - On request from OPMED - Part of control measures
Payment to pharmacies
Reporting (List, frequency and example)
Advisory service
Managed care service (List and define alternative options)
Authorisation services <ul style="list-style-type: none"> - Prescribed Minimum Benefits (PMB) CDL - For all chronic medicine - Access to expensive therapy - Oncology management - Management of day-to-day appliances - Management of medical appliances
List client support to OPMED
List the services offered by your Call Centre/Helpdesk to OPMED

- VAT must be specified separately as a total for each of the deliverables and phases. While VAT will be paid pro-rata for each delivery item in each of the assignments, it should be indicated as a total sum per Phase for purposes of this submission.
- Bidders should provide a **fixed price** for the period of the contract period including disbursements (see below for out of pocket expenses). It should be noted that OPMED has limited resources and bids must be very competitive with Market related pricing. This will be the deciding factor on the final award of the bid.
- The bid proposal must reflect all discounts for any service included in the bid. It should distinguish between standard discounts, special discounts and cumulative discounts, if any. All these should be reflected separately and the conditions applicable thereto must be specified. It must also be clearly stipulated whether any discounts represent credits.
- For disbursements/S&T, only actual costs are recoverable. Proof of expenses incurred must accompany certified invoices. NB: S & T outside GAUTENG must be authorised by the Project Manager in advance. **OPMED will only compensate for S & T incurred outside Gauteng Province.** Out-of-pocket expenses will be paid by OPMED at cost.
- All claims for travel and other legitimate disbursement expenditure outside Gauteng Province must be pre-approved by the Project Officer before they are incurred.
- Pre-approved project expenditure on travel outside the province, related reasonable accommodation costs, expenditure on document reproduction, or any other legitimate pre-approved project disbursement expenditure, will be reimbursed at cost. Payment will be made within 30 days of OPMED receiving approved and substantiated invoices, and does not form part of the remuneration schedule.
- Deliverables completed per remuneration schedule will be approved by the Project Officer, after which invoices may be submitted for payment as per remuneration schedule. OPMED will pay within 30 days of the approved invoice.

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

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

PRICE ADJUSTMENTS

A NON-FIRM PRICES SUBJECT TO ESCALATION

1. IN CASES OF PERIOD CONTRACTS, NON FIRM PRICES WILL BE ADJUSTED (LOADED) WITH THE ASSESSED CONTRACT PRICE ADJUSTMENTS IMPLICIT IN NON FIRM PRICES WHEN CALCULATING THE COMPARATIVE PRICES
2. IN THIS CATEGORY PRICE ESCALATIONS WILL ONLY BE CONSIDERED IN TERMS OF THE FOLLOWING FORMULA:

$$Pa = (1 - V)Pt \left(D1 \frac{R1t}{R1o} + D2 \frac{R2t}{R2o} + D3 \frac{R3t}{R3o} + D4 \frac{R4t}{R4o} \right) + VPt$$

Where:

- Pa = The new escalated price to be calculated.
- (1-V)Pt = 85% of the original bid price. Note that Pt must always be the original bid price and not an escalated price.
- D1, D2.. = Each factor of the bid price eg. labour, transport, clothing, footwear, etc. The total of the various factors D1, D2...etc. must add up to 100%.
- R1t, R2t..... = Index figure obtained from new index (depends on the number of factors used).
- R1o, R2o = Index figure at time of bidding.
- VPt = 15% of the original bid price. This portion of the bid price remains firm i.e. it is not subject to any price escalations.

3. The following index/indices must be used to calculate your bid price:

Index..... Dated..... Index..... Dated..... Index..... Dated.....
 Index..... Dated..... Index..... Dated..... Index..... Dated.....

4. *FURNISH A BREAKDOWN OF YOUR PRICE IN TERMS OF ABOVE-MENTIONED FORMULA. THE TOTAL OF THE VARIOUS FACTORS MUST ADD UP TO 100%.*

FACTOR (D1, D2 etc. eg. Labour, transport etc.)	PERCENTAGE OF BID PRICE

B. PRICES SUBJECT TO RATE OF EXCHANGE VARIATIONS

1. Please furnish full particulars of your financial institution, state the currencies used in the conversion of the prices of the items to South African currency, which portion of the price is subject to rate of exchange variations and the amounts remitted abroad.

PARTICULARS OF FINANCIAL INSTITUTION	ITEM NO	PRICE	CURRENCY	RATE	PORTION OF PRICE SUBJECT TO ROE	AMOUNT IN FOREIGN CURRENCY REMITTED ABROAD
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		

2. Adjustments for rate of exchange variations during the contract period will be calculated by using the average monthly exchange rates as issued by your commercial bank for the periods indicated hereunder: (Proof from bank required)

AVERAGE MONTHLY EXCHANGE RATES FOR THE PERIOD:	DATE DOCUMENTATION MUST BE SUBMITTED TO THIS OFFICE	DATE FROM WHICH NEW CALCULATED PRICES WILL BECOME EFFECTIVE	DATE UNTIL WHICH NEW CALCULATED PRICE WILL BE EFFECTIVE

NB: BIDDERS MAY USE THEIR COMPANY QUOTATIONS IN A LETTERHEAD

- 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" include value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

NB: BIDDERS MAY USE THEIR COMPANY QUOTATIONS IN A LETTERHEAD

Part 3-Schedule D

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**

2.2.1 If so, furnish particulars:
.....
.....

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.

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 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.

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.

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

Part 3-Schedule E

SBD 6.1

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: [Broad-Based Black Economic Empowerment \(B-BBEE\) Status Level of Contribution](#).

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 000 000 (all applicable taxes included).

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

(delete whichever is not applicable for this tender).

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

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

- (a) Price; and
- (b) Specific Goals: B-BBEE Status Level of Contributor.

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

The maximum points for this tender are allocated as follows:

	POINTS

PRICE	
SPECIFIC GOALS: B-BBEE STATUS LEVEL OF CONTRIBUTOR	
Total points for Price and SPECIFIC GOALS	100

- 1.5 In terms of the ACT (PPPFA), the specific goals may include— (i) contracting with persons, or categories of persons, historically disadvantaged by unfair discrimination on the basis of race, gender or disability; (ii) implementing the programmes of the Reconstruction and Development Programme as published in Government Gazette No. 16085 dated 23 November 1994; any specific goal for which a point may be awarded, must be clearly specified in the invitation to submit a tender;
- 1.6 To further the above, the State Security Agency has determined its Specific Goals to be those advanced by the Broad Based Black Economic Empowerment Act and its codes of good practice which are not contrary to the spirit and requirements of paragraph 1.5 above.
- 1.7 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.
- 1.8 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.
- 1.9 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.
- 1.10 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).
- (f) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-

Based Black Economic Empowerment Act;

- (g) **“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;
- (h) **“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;
- (i) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (j) **“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;
- (k) **“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;
- (a) **“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;

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \\ \mathbf{P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)} \end{array}$$

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 OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

- Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals (BBBEE status level) stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

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

4.1 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:

The specific goals allocated points in terms of this tender B-BBEE Status Level of Contributor	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
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		

5. BID DECLARATION

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

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 5.1

6.1 B-BBEE Status Level of Contributor: . =(maximum of 10 or 20 points)
 (Points claimed in respect of paragraph 6.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety

- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals (BBBEE status level) 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.

<p>.....</p> <p>SIGNATURE(S) OF TENDERER(S)</p>
<p>SURNAME AND NAME:</p>
<p>DATE:</p>
<p>ADDRESS:</p> <p>.....</p> <p>.....</p>

Part 3-Schedule F

Qualification and Experience

1. Details of the extent of the company activities and business, e.g. branches etc:

2. A list of existing and/or previous contracts relating to similar services:

Description of work and value	Period		Organization	Contact Person	Contact No
	Start date	End date			

3. Details of Qualifications of the Project Manager and the Key Personnel:

Name	Designation	Qualifications

.....
SIGNATURE OF (ON BEHALF OF) COMPANY

Part 3- Schedule G

Organisation Type

PARTNERSHIP/CLOSED CORPORATION/COMPANY

(delete which is not applicable)

The bidder comprises of the following partners/members/directors :

1. NAME _____

ADDRESS : _____

ID NUMBER: _____

2. NAME : _____

ADDRESS : _____

ID NUMBER: _____

3. NAME : _____

ADDRESS : _____

ID NUMBER: _____

4. NAME : _____

ADDRESS : _____

ID NUMBER: _____

5. NAME : _____
 ADDRESS : _____
 ID NUMBER: _____

.....

SIGNATURE OF (ON BEHALF OF) BIDDER

Part 3- Schedule H

Organisational Structure

1. Provide full details of the organizational structure which will be utilized in the provision of the Services (including where appropriate an organogram)

.....
 SIGNATURE OF (ON BEHALF OF) BIDDER

In the presence of:

1. _____

2. _____

Part 3- Schedule I

Details of Supplier's Office

1. Physical address of supplier's office

2. Telephone No of office: _____

3. Time period for which such office has been used by supplier: _____

.....
SIGNATURE OF (ON BEHALF OF) BIDDER

NAME IN CAPITAL LETTERS

In the presence of:

1. _____

2. _____

Part 3- Schedule I

Financial Particulars

This schedule must be completed by the bidder and submitted together with the bid. Documentary proof confirming availability of financial resources to execute the contract from the bidder's financial institution and /or Audited Financial Statements must be submitted with the bid. If this requirement is not complied with in full the bid will be considered invalid

Nature of Service: _____

Name of bidder: _____

Bid Number: _____

	<p align="center"><u>FINANCIAL POSITION OF BIDDER</u></p> <p>I/we hereby certify that I/we have the necessary financial capacity and resources to execute the above contract successfully for the bid amount. I / we hereby attach letter confirming availability of financial resources from the financial institution. I / we give the SSA permission to contact the financial institution below to confirm the information provided.</p> <p>In the absence of the above, a letter confirming that the bidder has applied for financial assistance from any financial institution and that the institution is willing to favourably consider such application in the event that the bidder is successful, will also satisfy the Department.</p>
NAME OF FINANCIAL INSTITUTE	
ADDRESS	
TEL.NO	

FAX NO.	
CONTACT PERSON	

SIGNATURE OF (ON BEHALF OF) BIDDER

NAME IN CAPITALS

In the presence of :

1. _____

2. _____

Part 3- Schedule J

Part 3- Schedule K

SECURITY CLEARANCE REQUIREMENTS

DECLARATIONS

A. Does the business meet the government's Black Economic Empowerment requirements as per the relevant industry charter?

Yes: No:

If YES Explain:

.....
.....
.....
.....
.....
.....

B. Do you declare that the business is NOT a BEE front company?

Yes: No:

If NO Explain:

.....
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.....

C. Does the business have any associated family? Friends or business associates in the employ of the Ministry of Intelligence?

Yes: No:

If YES Explain:

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.....
.....

CONFIDENTIAL

D. Do any of the above mentioned in Declaration C have any financial interest in the business?

Yes: No:

If YES Explain:

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E. Do you declare that the company is currently in a stable and sustainable financial position

Yes: No:

If YES Explain:

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F. Has the business done any work for a foreign government institution intelligence agency?

Yes: No:.....

If YES Explain:

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.....

G. Has the business or any of its principals/ employees obtained a security clearance from any foreign or local governmental institution?

Yes: No:

If YES Explain:

.....
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.....
.....
.....
.....

CONFIDENTIAL

THE CONTENTS OF THIS DECLARATION FORM MUST BE CERTIFIED AS CORRECT

Hereby the undersigned certifies that:

1. Note is taken that the completed declaration is for official use only and will be treated as strictly **CONFIDENTIAL**.
2. The information stated in this declaration is accurate and true and note is taken that false information will have a negative effect on the security clearance of the company and its principals.
3. The signatory will be held immediately responsible for any fraudulent or incorrect information provided.

Company:

Respondents name:

I.D. number:

Position:

Date:

Signature: