

**SBD1**

**PART A  
INVITATION TO BID**

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                      |               |                        |               |                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|------------------------|---------------|-----------------|
| <b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                      |               |                        |               |                 |
| BID NUMBER:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>Q5823/2018</b>                                                                                                                                                                                                    | CLOSING DATE: | <b>23 January 2018</b> | CLOSING TIME: | <b>11:00 am</b> |
| DESCRIPTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A WORK STUDY INVESTIGATION TO ASSESS THE CURRENT SITUATION AND WORK LOAD AMONGST THE SUPPLY CHAIN AND ASSET MANAGEMENT POSITIONS IN THE SANBI'S FINANCE DIVISION</b> |               |                        |               |                 |
| <p>Quotations can be submitted in the tender box located in the Biodiversity Building at the Pretoria National Botanical Garden, 2 Cussonia Avenue, Brummeria, Pretoria during office hours on <b>23 January 2018 by 11:00</b>. Normal office hours: 08:00 – 16:00 (see street address above) or posted to the following address:</p> <p>SCM Manager<br/>         South African National Biodiversity Institute (SANBI)<br/>         Private Bag X101<br/>         Pretoria<br/>         0001</p> <p>Submission of proposals: proposals must be emailed to Ms. Nomsa Mathebula at <a href="mailto:n.mathebula@sanbi.org.za">n.mathebula@sanbi.org.za</a> with a copy to Mr. Prince Hlongwane at <a href="mailto:p.hlongwane@sanbi.org.za">p.hlongwane@sanbi.org.za</a></p> |                                                                                                                                                                                                                      |               |                        |               |                 |

|                                                                    |      |                                                             |        |                                                                                          |         |
|--------------------------------------------------------------------|------|-------------------------------------------------------------|--------|------------------------------------------------------------------------------------------|---------|
| <b>SUPPLIER INFORMATION</b>                                        |      |                                                             |        |                                                                                          |         |
| NAME OF BIDDER                                                     |      |                                                             |        |                                                                                          |         |
| POSTAL ADDRESS                                                     |      |                                                             |        |                                                                                          |         |
| STREET ADDRESS                                                     |      |                                                             |        |                                                                                          |         |
| TELEPHONE NUMBER                                                   | CODE |                                                             | NUMBER |                                                                                          |         |
| CELLPHONE NUMBER                                                   |      |                                                             |        |                                                                                          |         |
| FACSIMILE NUMBER                                                   | CODE |                                                             | NUMBER |                                                                                          |         |
| E-MAIL ADDRESS                                                     |      |                                                             |        |                                                                                          |         |
| VAT REGISTRATION NUMBER                                            |      |                                                             |        |                                                                                          |         |
|                                                                    |      |                                                             |        |                                                                                          |         |
|                                                                    |      | TCS PIN:                                                    |        | OR                                                                                       | CSD No: |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX] |      | <input type="checkbox"/> Yes<br><input type="checkbox"/> No |        | B-BBEE STATUS LEVEL SWORN<br><input type="checkbox"/> Yes<br><input type="checkbox"/> No |         |

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|                                                                                                                                                                    |                                                                                    |                                                                                    |                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
|                                                                                                                                                                    |                                                                                    | AFFIDAVIT                                                                          |                                                                                             |
| IF YES, WHO WAS THE CERTIFICATE ISSUED BY?                                                                                                                         |                                                                                    |                                                                                    |                                                                                             |
| AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX                                                   | <input type="checkbox"/>                                                           | AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)           |                                                                                             |
|                                                                                                                                                                    | <input type="checkbox"/>                                                           | A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS) |                                                                                             |
|                                                                                                                                                                    | <input type="checkbox"/>                                                           | A REGISTERED AUDITOR                                                               |                                                                                             |
|                                                                                                                                                                    | NAME:                                                                              |                                                                                    |                                                                                             |
| <b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs&amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b> |                                                                                    |                                                                                    |                                                                                             |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?                                                                      | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES ENCLOSE PROOF] | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?           | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES ANSWER PART B:3 BELOW ] |
| SIGNATURE OF BIDDER                                                                                                                                                | .....                                                                              | DATE                                                                               |                                                                                             |
| CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)                                           |                                                                                    |                                                                                    |                                                                                             |
| TOTAL NUMBER OF ITEMS OFFERED                                                                                                                                      |                                                                                    | TOTAL BID PRICE (ALL INCLUSIVE)                                                    |                                                                                             |
| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>                                                                                                             |                                                                                    | <b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>                                   |                                                                                             |
| DEPARTMENT/ PUBLIC ENTITY                                                                                                                                          | SANBI                                                                              | CONTACT PERSON                                                                     | Mr Kgabo Moloto                                                                             |
| CONTACT PERSON                                                                                                                                                     | Nomsa Mathebula                                                                    | TELEPHONE NUMBER                                                                   | 012 843 5236                                                                                |
| TELEPHONE NUMBER                                                                                                                                                   | 012 843 5033                                                                       | FACSIMILE NUMBER                                                                   | NONE                                                                                        |
| FACSIMILE NUMBER                                                                                                                                                   |                                                                                    | E-MAIL ADDRESS                                                                     | <a href="mailto:k.moloto@sanbi.org.za">k.moloto@sanbi.org.za</a>                            |
| E-MAIL ADDRESS                                                                                                                                                     | <a href="mailto:n.mathebula@sanbi.org.za">n.mathebula@sanbi.org.za</a>             |                                                                                    |                                                                                             |

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## PART B TERMS AND CONDITIONS FOR BIDDING

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

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YES ☐ NO

**IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.**

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

## **SBD 4**

### **DECLARATION OF INTEREST**

1. Any legal person, including persons employed by the state<sup>1</sup>, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative:  
 .....

2.2 Identity  
 Number:.....  
 .....

2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>, member):  
 .....  
 .....

2.4 Registration number of company, enterprise, close corporation, partnership agreement

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or trust:  
 .....  
 .....

2.5 Tax Reference Number:  
 .....

2.6 VAT Registration Number:  
 .....

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

<sup>1</sup>"State" means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

<sup>2</sup>"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

.....

Name of state institution at which you or the person connected to the bidder is employed :

.....

Position occupied in the state institution:

.....

Any other particulars:

.....

.....

.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

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

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES/NO**

2.11.1 If so, furnish particulars:

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

3 Full details of directors / trustees / members / shareholders.

| Full Name | Identity Number | Personal Tax Number | Income Reference Number | State Number | Employee / Persal Number |
|-----------|-----------------|---------------------|-------------------------|--------------|--------------------------|
|           |                 |                     |                         |              |                          |
|           |                 |                     |                         |              |                          |
|           |                 |                     |                         |              |                          |
|           |                 |                     |                         |              |                          |
|           |                 |                     |                         |              |                          |
|           |                 |                     |                         |              |                          |
|           |                 |                     |                         |              |                          |

4 DECLARATION

I, \_\_\_\_\_ THE \_\_\_\_\_ UNDERSIGNED  
 (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
 Signature Date

.....  
 Position Name of bidder

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**SBD 6.1**

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017**

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, 2017.**

**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 **not exceed** R500 000 (all applicable taxes included) and therefore the **80/20** preference point system shall be applicable; or
- b) The 80/20 preference point system will be applicable to this tender.

1.3 Points for this bid shall be awarded for:

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

1.4 The maximum points for this bid are allocated as follows:

|                                                   | POINTS |
|---------------------------------------------------|--------|
| PRICE                                             | 80     |
| B-BBEE STATUS LEVEL OF CONTRIBUTOR                | 20     |
| Total points for Price and B-BBEE must not exceed | 100    |

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

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- 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) **“prices”** 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. POINTS AWARDED FOR PRICE

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### 3.1 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**

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

**or**

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

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. 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:

| 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                               |

## 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 4.1

6.1 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

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paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

## 7. SUB-CONTRACTING

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

(Tick applicable box)

|     |                          |    |                          |
|-----|--------------------------|----|--------------------------|
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|-----|--------------------------|----|--------------------------|

7.1.1 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 | <input type="checkbox"/> | NO | <input type="checkbox"/> |
|-----|--------------------------|----|--------------------------|

- 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<br>√                 | QSE<br>√                 |
|-------------------------------------------------------------------|--------------------------|--------------------------|
| Black people                                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Black people who are youth                                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Black people who are women                                        | <input type="checkbox"/> | <input type="checkbox"/> |
| Black people with disabilities                                    | <input type="checkbox"/> | <input type="checkbox"/> |
| Black people living in rural or underdeveloped areas or townships | <input type="checkbox"/> | <input type="checkbox"/> |
| Cooperative owned by black people                                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Black people who are military veterans                            | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>OR</b>                                                         |                          |                          |
| Any EME                                                           | <input type="checkbox"/> | <input type="checkbox"/> |
| Any QSE                                                           | <input type="checkbox"/> | <input type="checkbox"/> |

## 8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company

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- ☐ (Pty) Limited  
 [TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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

8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer  
☐ Supplier  
☐ Professional service provider  
☐ Other service providers, e.g. transporter, etc.  
 [TICK APPLICABLE BOX]

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

8.8 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 .....

.....  
.....

### DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
  - a. abused the institution's supply chain management system;
  - b. committed fraud or any other improper conduct in relation to such system; or
  - c. failed to perform on any previous contract.
- 4 **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

| Item  | Question                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Yes                             | No                             |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|--------------------------------|
| 4.1   | Is the bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector?<br><br>(Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).                                                                                                                    | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.1.1 | If so, furnish particulars:                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                 |                                |
| 4.2   | Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?<br><br><b>As this Register enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a>, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.</b> | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.2.1 | If so, furnish particulars:                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                 |                                |

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|       |                                                                                                                                                                                    |                                 |                                |
|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|--------------------------------|
| 4.3   | Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years? | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.3.1 | If so, furnish particulars:                                                                                                                                                        |                                 |                                |
| 4.4   | Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?                  | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.4.1 | If so, furnish particulars:                                                                                                                                                        |                                 |                                |

**SBD 8**

### CERTIFICATION

I, THE UNDERSIGNED (FULL NAME).....  
 CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of Bidder**  
 Js365bW

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**CERTIFICATE OF INDEPENDENT QUOTATION DETERMINATION**

- 1 This Standard Bidding Document (SBD) must form part of all quotations<sup>1</sup> invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).<sup>2</sup> Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
  - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
  - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

<sup>2</sup> Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

**SANBI: Q5823/2018: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A WORK STUDY INVESTIGATION TO ASSESS THE CURRENT SITUATION AND WORK LOAD AMONGST THE SUPPLY CHAIN AND ASSET MANAGEMENT POSITIONS IN THE SANBI'S FINANCE DIVISION**

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(Quotation Number and Description)

in response to the invitation for the quote made by:

**SANBI** (Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of:

\_\_\_\_\_ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

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- (a) has been requested to submit a bid in response to this bid invitation;
    - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
    - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
  - 6. 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 consortium<sup>3</sup> will not be construed as collusive bidding.
  - 7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
    - (a) prices;
    - (b) geographical area where product or service will be rendered (market allocation)
    - (c) methods, factors or formulas used to calculate prices;
    - (d) the intention or decision to submit or not to submit, a bid;
    - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
    - (f) bidding with the intention not to win the bid.
  - 8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
- <sup>3</sup> 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.
- 9. 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.
  - 10. 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.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of Bidder

## **TERMS OF REFERENCE**

**QUOTATION: Q5823/2018**

### **APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A WORK STUDY INVESTIGATION TO ASSESS THE CURRENT SITUATION AND WORK LOAD AMONGST THE SUPPLY CHAIN AND ASSET MANAGEMENT POSITIONS IN THE SANBI'S FINANCE DIVISION**

#### **1. INTRODUCTION AND BACKGROUND**

The South African National Biodiversity Institute (SANBI) derives its mandate from the National Environmental Management: Biodiversity Act (NEMBA), No. 10 of 2004. Chapter 1, Section 2 of NEMBA defines the following objectives:

- (a) To provide for the management and conservation of biological diversity within the Republic of South Africa and of the components of such biological diversity; the use of indigenous biological resources in a sustainable manner; and the fair and equivalent sharing among stakeholders of benefits arising from bioprospecting involving indigenous biological resources.
- (b) To give effect to ratified international agreements, relating to biodiversity, that are binding on the Republic.
- (c) To provide for co-operative governance in biodiversity management and conservation.
- (d) To provide for a South African National Biodiversity (SANBI) Institute to assist in achieving the objectives of this Act.

The Supply Chain and Asset Management Directorate provides strategic and operational financial resources services to the entire Institute. In order to support the Institute, the Supply Chain and Asset Management Directorate needs to have employees who are capable and possessing the skills to operate at a strategic and operational level to assist the Institute in dealing with its financial resources challenges. Furthermore, people who are capable of operating at a strategic level are frequently bogged down with operational work. The Supply Chain and

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Asset Management Directorate must be well capacitated and appropriately structured in order to strategically support the Institute in terms of the financial needs.

## **2. RATIONALE FOR CONDUCTING A WORK STUDY INVESTIGATION**

The main objective of conducting the work study investigation is to ensure that the structure of Supply Chain and Asset Management Directorate is appropriately structured in order to support the Institute both strategically and operationally in terms of procurement and assets activities. Furthermore, this study will help to assess the current Supply Chain and Asset Management capacity in preparation of taking over the National Zoological Gardens next year (April 2018), upcoming donor funded projects as well as the establishment of a new National Botanical Garden in Thohoyandou.

## **3. SCOPE OF WORK**

The scope of work will focus on the following:

- (a) Analysing the existing job descriptions of employees within the Supply Chain and Asset Management in Pretoria.
- (b) Interviewing all the employees in the Supply Chain and Asset Management Directorate in Pretoria.
- (c) Conducting method (time and motion study) study which will focus on the systematic recording and critical examination of existing and proposed ways of performing Supply Chain and Asset Management work.
- (d) Conducting work measurement to establish the time for all Supply Chain and Asset Management roles to carry out a specific job at a defined level of performance.
- (e) Identifying whether there is a need for any additional posts or re-design of responsibilities required to efficiently achieve the work requirements of the employees in the Supply Chain and Asset Management Directorate.
- (f) Conducting skills audit to identify the skills gap within the Supply Chain and Asset Management Directorate.

- (g) Assess the current structure of the Supply Chain and Asset Management Directorate to determine whether is capable of supporting the Institute strategically and operationally, currently as well as in long term.

### 3.1 Number of filled positions

There are 12 positions in the Supply Chain and Asset Management Directorate. The breakdown of the positions is as follows:-

| Posts                                               | Number of posts | Centre   |
|-----------------------------------------------------|-----------------|----------|
| Director: Supply Chain and Asset Management         | 1               | Pretoria |
| Deputy Director: Supply Chain Management            | 1               | Pretoria |
| Deputy Director: Asset Management                   | 1               | Pretoria |
| Assistant Directors: Supply Chain Management        | 2               | Pretoria |
| Office Manager: Office of the CFO and Director: SCM | 1               | Pretoria |
| Senior Supply Chain Officer                         | 1               | Pretoria |
| Supply Chain Officers                               | 4               | Pretoria |
| Senior Asset Management Clerks                      | 2               | Pretoria |
| <b>Total number</b>                                 | <b>12</b>       |          |

3.1.1 The interviews will be conducted face-to-face in Pretoria.

#### **4 REQUIREMENTS**

The appointed Service Provider must have extensive experience and sound track record in method study, work measurement and job design.

#### **5. DELIVERABLES AND MILESTONES**

The final report must be presented to the Senior Management representatives of the Finance Division as well as the Executive Committee of SANBI.

#### **6. TIMELINES**

The work study investigation exercise for the entire Supply Chain and Asset Management Directorate must be finalised in two months from the appointment date.

#### **7. CONTRACTUAL ARRANGEMENTS**

- The contract will be drawn up between the SANBI and the appointed Service Provider.
- Invoices will be paid on completion of deliverables in accordance with the contract.
- Invoices must be accompanied by reports.

#### **8. DOCUMENTS REQUIRED**

- SBD forms: 1,4,6.1,8 And 9
- An original of certified copy of B-BBEE certificate or sworn affidavit.( Please note that failure to submit a valid original or certified B-BBEE certificate/sworn affidavit mentioned above will be awarded for B-BBEE status
- Service Provider must be registered on the CSD and Tax compliant

#### **9. FUNCTIONALITY EVALUATION CRITERIA:**

In accordance with the National Treasury Instruction Note on the amended Guidelines in respect of proposals that includes functionality as a criterion for evaluation (issued 3 September 2010), the proposals will be evaluated in two stages:

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Stage 1 will evaluate functionality according to the criteria listed in the table below:

| Criteria for measuring functionality                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Weight     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| <b><u>Team Capacity</u></b><br>The service provider should demonstrate the abilities of the team to carry out the work required in this project. The team must possess the qualification, expertise and competencies relevant to this project. Curriculum Vitae of staff who will be available for the duration of the contract should be included.                                                                                                                                                      | 40         |
| <b><u>Past experience</u></b><br>This refers to the previous experience of the service provider to undertake the scope of work involved in conducting work study investigations. The service provider is required to provide the following: <ul style="list-style-type: none"> <li>• Scope of work and scale of current and past projects undertaken in conducting work study investigations.</li> <li>• Current and previous organizations serviced in conducting work study investigations.</li> </ul> | 40         |
| Proposed methodology and approach in in conducting work study investigations.                                                                                                                                                                                                                                                                                                                                                                                                                            | 20         |
| <b>TOTAL</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>100</b> |

*Service providers who fail to score a minimum of 70 out of a possible 100 points for functionality will not be eligible for further consideration.*

The second stage will evaluate the price and preferential points of those bids that meet the minimum threshold for functionality. In accordance with the Preferential Procurement Regulations, 2011 pertaining to the Preferential Procurement Policy Framework Act (No. 5 of 2000), the 90/10 point system will be applied in evaluating proposals that qualify for further

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consideration, where price constitutes 80 points and a maximum of 20 points will be awarded based on the B-BBEE Status Level Certificate submitted with the proposal. Failure to submit such certificate will not necessarily result in the proposal being disqualified, but no points will be awarded for B-BBEE status.

## **10. Submission**

**Closing date for submission of responses: 11h00 on 23 January 2018**

Quotations can be submitted in the tender box located in the Biodiversity Building at the Pretoria National Botanical Garden, 2 Cussonia Avenue, Brummeria, Pretoria during office hours on **23 January 2018 by 11:00**. Normal office hours: 08:00 – 16:00 (see street address above) or posted to the following address:

SCM Manager  
South African National Biodiversity Institute (SANBI)  
Private Bag X101  
Pretoria  
0001

Or emailed to Ms. Nomsa Mathebula [n.mathebula@sanbi.org.za](mailto:n.mathebula@sanbi.org.za) with a copy to Mr. Prince Hlongwane at [p.hlongwane@sanbi.org.za](mailto:p.hlongwane@sanbi.org.za)

Requests for further information to these ToR must be emailed to:  
Kgabo Moloto [k.moloto@sanbi.org.za](mailto:k.moloto@sanbi.org.za) or call 012 843 5236