

PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)					
BID NUMBER:	Q8132/2022	CLOSING DATE:	24 JUNE 2022	CLOSING TIME:	12h00
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP A FINANCIAL SUSTAINABILITY MODEL, STRATEGY AND PLAN OF THE SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE (SANBI)				
Submission of proposals: proposals must be emailed to S.SCM-Quotations@sanbi.org.za with a copy to Ms. T. Lubisi at T.Lubisi@sanbi.org.za and Mr. Naphtally Kgola at N.Kgola@sanbi.org.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Tryphina Lubisi	CONTACT PERSON	Lorato Sithole		
TELEPHONE NUMBER	012 843 5163	TELEPHONE NUMBER	0128435179/5298		
FACSIMILE NUMBER	N/A	FACSIMILE NUMBER	N/A		
E-MAIL ADDRESS	T.Lubisi@sanbi.org.za	E-MAIL ADDRESS	L.Sithole@sanbi.org.za Cc: P.Ntingashe@sanbi.org.za		
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		[TICK APPLICABLE BOX] ☐ Yes ☐ 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?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ 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)

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DATE:

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

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

Full Name	Identity Number	Name of institution	State

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....
.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

I, _____ the _____ undersigned,
(name)..... in
submitting the accompanying bid, do hereby make the following statements
that I certify to be true and complete in every respect:

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or

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- 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.

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
.....

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.

Position

Name of bidder

QUOTATION NUMBER: Q8132/2022

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP A FINANCIAL SUSTAINABILITY MODEL, STRATEGY AND PLAN OF THE SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE (SANBI)

PURPOSE

To appoint a service provider to develop a financial sustainability strategy and plan of the South African National Biodiversity Institute (SANBI).

BACKGROUND

SANBI is a Schedule 3A Public Entity established in terms of the National Environmental Management: Biodiversity Act, 2004 (No. 10 of 2004).

Our vision: Biodiversity richness for all South Africans.

Our mission is to champion the exploration, conservation, sustainable use, appreciation and enjoyment of South Africa's exceptionally rich biodiversity for all people.

SANBI plays a leadership role in:

- Generating, coordinating and interpreting the knowledge and evidence required to support policies and decisions relating to all aspects of biodiversity
- The human capital development strategy of the sector.

SANBI also manages the National Botanical and Zoological Gardens as windows to South Africa's biodiversity for recreation, education and research purposes.

SANBI seeks to develop a ten-year outlook financial feasibility and sustainability model and strategy as well as the associated implementation plan. This model and strategy shall be sound, contextual, credible, and should outline the future growth of SANBI towards becoming a financially sustainable public entity. The approach should take into consideration SANBI's value chains including but not limited to its product offerings, services, marketing, commercialization, pricing, and strategic partnerships.

SCOPE OF WORK AND DELIVERABLES

The successful service provider will be responsible to develop a ten-year outlook financial feasibility and sustainability model and strategy with the implementation plan which incorporates amongst others the following:

- Analyse the current environment and conduct a situational analysis.
- Identify gaps and new opportunities to strengthen a funding, marketing and commercialization diversification strategy.
- Consolidate all SANBI's current financing activities as enabled by legislative provisions.

- Consider other available fund raising, resource mobilization, income generation and commercialization innovations.
- Develop and recommend a ten year financial feasibility and sustainability model and strategy with clear and specific short, medium and long-term goals, objectives, indicators and targets.
- Develop an annual implementation plan with specific actions and timelines to achieve the short, medium and long-term outlook financial feasibility and sustainability goals and objectives.
- Assess institutional capacity, knowledge and skills needed to fulfil the plan.
- Make specific recommendations that would assist SANBI to improve its commercialization, income generation and resource mobilisation capabilities.
- Establish a database of potential funding partners and donors with a specific approach that the possible funders may find beneficial to engage with SANBI and provide recommendations for next steps in approaching these sources of funding.
- List of funding opportunities across the world prioritised according to the best possible match between the mandate of SANBI and funder's interests.
- Provide a stand alone executive summary of the outlook financial feasibility and sustainability model, strategy and plan.
- Present the findings, recommendations, model, strategy and implementation plan.

REPORTING

The successful service provider will be required to:

- Commence work immediately after appointment and the entire scope of the work must be completed by 28 February 2023.
- Report timeously and on a regular basis on progress.
- Identify and consult with the relevant internal and external stakeholders.
- The successful service provider is expected to present the draft strategy and implementation plan to EXCO, Board and/or relevant Committee(s), address any comments and recommendations towards consolidating the final Report.

EVALUATION CRITERIA

SANBI promotes the concept of “best value” in the award of contracts, as opposed to merely looking for the cheapest price, which does not necessarily provide the best value. Best value incorporates the expertise, experience and technical proposal of the organisation and individuals who will be providing the service and the organisational capacity supporting the project team. The minimum functional threshold will be 70%. Bidders that do not achieve this scoring will not be eligible for further consideration.

Bidders that have scored minimum threshold stipulated on the TOR will qualify for the next stage of evaluation. Thereafter the recommendation of the appointable bidder will be based on the lowest pricing proposal.

Criteria	Weight	Points
Quality of Methodology How will service provider go about identifying the different phases of the project, sourcing of information, identify relevant stakeholders and facilitate the meetings. Service provider should provide a detailed methodology in the approach of executing the project.	30	4 = The methodology is more than comprehensively described and provides detailed information regarding the relevant aspects of the project and exceeds the expectation. 3 = The methodology is satisfactorily and meets the requirements and provides information regarding the relevant aspects of the project and has comprehensive information. 2 = The methodology is very briefly described and provides little information regarding the relevant aspects of the project. 1 = The methodology is poorly described and/or does not provide any information regarding the relevant aspects of the project.
Proposed project management and execution plan indicating key activities, targets, indicators, objectives and outcomes.	20	4 = Project Plan indicates clear key deliverables, activities and exceeds expectations. 3 = Project Plan indicates clearly key activities, targets, indicators, objectives and outcomes

		and milestones satisfactorily. 2 = Project plan partially covers all elements. 1= Project plan poorly indicates key deliverables, activities and milestones.
Qualifications and experience of core team members - Relevant qualifications and experience in relation to the scope of work. - Please enclose CV's that shows experience and qualifications as well as and membership of the professional bodies where applicable. - Minimum of 10 years' experience in conducting similar or equivalent assignment. - Experience and knowledge of applicable PFMA, Accounting, Commerce, Environmental and its related Legislation. - Minimum of 3 traceable references of similar or equivalent experience relating to the scope of work completed in the last five years.	20	4= Qualifications and experience exceed the requirements. 3 = Qualifications and experience demonstrate ability of the bidder and complies with the requirements. 2 = Qualifications and experience demonstrate average experience. 1 = Qualifications and experience demonstrate poor experience.
Proven track record and experience in providing similar assignments. List should state the nature of the assignment; the value; the duration and contactable reference) Proof of such as appointment letters or reference letters should be provided and the references should be traceable.	20	4 = The knowledge exceeds understanding of the requirements. 3 = The knowledge is clear and relevant and is demonstrating bidders understanding of the requirements. 2 = The knowledge provided demonstrate average understanding of the requirements. 1 = The knowledge provided lacks context of the requirement.

Evaluation of references received	10	4 = Eleven or more relevant references 3 = Six to Ten relevant references 2 = Four to Five relevant references 1 = One to Three relevant references
TOTAL	100	

Applications must be emailed to **SANBI SCM** at S.SCM-Quotations@sanbi.org.za and copy Naphtally Kgola N.Kgola@sanbi.org.za and Ms. Tryphina Lubisi T.Lubisi@sanbi.org.za at or hand delivered to South African National Biodiversity Institute (SANBI), 2nd Cussonia Avenue, Brummeria, Pretoria, at Biodiversity Building (Tender box). Emailed applications must not be more than 5MB in size.

Any further enquiries in this regard should be directed to Ms Lorato Sithole on L.Sithole@sanbi.org.za and copy Ms. Phelokazi Ntingashe P.Ntingashe@sanbi.org.za