

## PART A INVITATION TO BID

|                                                                                                                                                                                                                                       |                                                                                      |                                      |                                                                          |                                                                  |                                                                                                      |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------------------|--------------------------------------------------------------------------|------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| <b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)</b>                                                                                                                          |                                                                                      |                                      |                                                                          |                                                                  |                                                                                                      |
| RFQ NUMBER: <b>Q8586/2022</b>                                                                                                                                                                                                         |                                                                                      | CLOSING DATE: <b>14 October 2022</b> |                                                                          | CLOSING TIME: <b>11:00am</b>                                     |                                                                                                      |
| <b>SANBI requires to appoint a Service Provider to provide Data science support for biodiversity indicator databases and workflows</b>                                                                                                |                                                                                      |                                      |                                                                          |                                                                  |                                                                                                      |
| <b>BID RESPONSE DOCUMENTS MAY BE E-MAILED TO BELOW ADDRESSES:</b>                                                                                                                                                                     |                                                                                      |                                      |                                                                          |                                                                  |                                                                                                      |
| Submission of proposals: Proposals must be emailed to Ms. Ripfumelo Fumani <a href="mailto:S.SCM-Quotations@sanbi.org.za">S.SCM-Quotations@sanbi.org.za</a> and copy <a href="mailto:r.fumani@sanbi.org.za">r.fumani@sanbi.org.za</a> |                                                                                      |                                      |                                                                          |                                                                  |                                                                                                      |
| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>                                                                                                                                                                                 |                                                                                      |                                      | <b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>                           |                                                                  |                                                                                                      |
| CONTACT PERSON                                                                                                                                                                                                                        | <b>Ripfumelo Fumani</b>                                                              |                                      | CONTACT PERSON                                                           | <b>Gloria Cupido</b>                                             |                                                                                                      |
| TELEPHONE NUMBER                                                                                                                                                                                                                      | <b>012-843-5037</b>                                                                  |                                      | TELEPHONE NUMBER                                                         | <b>(021) 799-8858</b>                                            |                                                                                                      |
| FACSIMILE NUMBER                                                                                                                                                                                                                      | <b>N/A</b>                                                                           |                                      | FACSIMILE NUMBER                                                         | <b>N/A</b>                                                       |                                                                                                      |
| E-MAIL ADDRESS                                                                                                                                                                                                                        | <a href="mailto:r.fumani@sanbi.org.za">r.fumani@sanbi.org.za</a>                     |                                      | E-MAIL ADDRESS                                                           | <a href="mailto:g.cupido@sanbi.org.za">g.cupido@sanbi.org.za</a> |                                                                                                      |
| <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                                                                                                                                                                                                               |                                                                                      |                                      |                                                                          |                                                                  |                                                                                                      |
| SUPPLIER COMPLIANCE STATUS                                                                                                                                                                                                            | TAX COMPLIANCE SYSTEM PIN:                                                           |                                      | OR                                                                       | CENTRAL SUPPLIER DATABASE No:                                    | MAAA                                                                                                 |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE                                                                                                                                                                                          | TICK APPLICABLE BOX]<br><br><input type="checkbox"/> Yes <input type="checkbox"/> No |                                      | B-BBEE STATUS LEVEL SWORN AFFIDAVIT                                      |                                                                  | TICK APPLICABLE BOX]<br><br><input type="checkbox"/> Yes <input type="checkbox"/> No                 |
| <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 THE QUESTIONNAIRE BELOW] |
| <b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>                                                                                                                                                                                     |                                                                                      |                                      |                                                                          |                                                                  |                                                                                                      |
| 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         |                                                                                                      |
| <b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM</b>                                                                                                         |                                                                                      |                                      |                                                                          |                                                                  |                                                                                                      |

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

|                                                                                                                                                                                                                                                |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1. BID SUBMISSION:</b>                                                                                                                                                                                                                      |
| 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.                                                                                                                   |
| 1.2. <b>ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.</b>                                                                                                    |
| 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. <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>                                                                                                                                         |
| <b>2. TAX COMPLIANCE REQUIREMENTS</b>                                                                                                                                                                                                          |
| 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: .....

## **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 interest<sup>1</sup> 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:

.....  
 .....

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

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<sup>1</sup> 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.

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 consortium<sup>2</sup> 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.

<sup>2</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.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

## 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 R50 000 000 (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         |
| <b>Total points for Price and B-BBEE must not exceed</b> | <b>100</b> |

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

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

### 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of

good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“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   |
| 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

### 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

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

Where

Ps = Points scored for price of bid under consideration

Pt = 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 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"/> |

**OR**

|         |  |  |
|---------|--|--|
| Any EME |  |  |
| Any QSE |  |  |

**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
- ☐ (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 .....

.....

.....

## TERMS OF REFERENCE

### **For the appointment of a Service Provider to provide Data science support for biodiversity indicator databases and workflows**

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#### **1. Purpose**

Terms of Reference (ToR) to be followed for the appointment of a Service Provider to provide Data science support for biodiversity indicator databases and workflows.

#### **2. Background**

The South African National Biodiversity Institute (SANBI) seeks to appoint a suitably qualified and innovative data science service provider (individual or team) on an independent contractor agreement to provide support on biodiversity Indicator databases and workflows to support the Multidimensional Biodiversity Index Project, the National Biodiversity Assessment and Biodiversity Information Management.

The South African National Biodiversity Institute is mandated to monitor and report on the status of biodiversity in South Africa (Section 49: NEM: Biodiversity Act - No. 10 of 2010). At the heart of SANBI's mandate and vision lies the concept of the "information to action" value chain. Taking the vast array of biodiversity and related data through the required processing and analytical steps to ensure that decision-makers and the public are equipped with the knowledge they require. As we enter the information age the way in which we collect, analyse and present information is changing rapidly; to keep up we need to advance our skills in data science. The development and maintenance of biodiversity indicators is central to SANBI's mandate and forms an important aspect of BRAM and BIPA work.

The Multidimensional Biodiversity Index Project, the National Biodiversity Assessment unit and Biodiversity Information Management team need support on biodiversity indicator databases and workflows – specifically: a) data wrangling (cleaning and adapting data for a specific purpose), b) automation of processes and analyses (to ensure repeatability and transparency), c) database design and management (to enhance access and version control), d) the ability to perform statistical analyses and modelling using interactive software applications like R and Python, e) data visualisation and record keeping (markdown) and f) web based reporting tools (dashboards).

### 3. Criteria for evaluating the successful Service Provider:

The Preferential Procurement Policy Framework Action (No. 5 of 2000) and SANBI procurement processes applies to these Terms of Reference. Proposals will be evaluated in two stages:

3.1 The first stage will evaluate functionality according to the criteria listed in the table below:

| Criteria for measuring functionality                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Weight       |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|--------|-----------------------------------------------------|----|---------------------------------------------|----|-----------------------------------------------|----|-------------------------------------------------|----|------------------------------|---|--------------|--------|-------------------------------------|----|------------------------------------------------|----|--------------------------------------------------|----|------------------------------------------------------|---|-------------------------------|---|---------------|---|----------|
| <div><div><div>• Technical merit of the proposal:</div><div><div>- Approach, deliverables and timeframes, demonstrated understanding of the requirements</div></div></div><table><thead><tr><th>Sub-criteria</th><th>Points</th></tr></thead><tbody><tr><td>More than six (6) years -more ' relevant experience</td><td>40</td></tr><tr><td>Five (5)- six(6) years' relevant experience</td><td>32</td></tr><tr><td>Four (4) – five (5) years relevant experience</td><td>24</td></tr><tr><td>Three (3) – four (4) years' relevant experience</td><td>16</td></tr><tr><td>O-2 yeas relevant experience</td><td>8</td></tr></tbody></table></div> <div><div>• Qualifications and/or relevant past experience</div><table><thead><tr><th>Sub-criteria</th><th>Points</th></tr></thead><tbody><tr><td>More than six (6) years' experience</td><td>20</td></tr><tr><td>Between four (4) and six (6) years' experience</td><td>16</td></tr><tr><td>Between three (3) and four (4) years' experience</td><td>12</td></tr><tr><td>Between than one (1) and three (3) years' experience</td><td>8</td></tr><tr><td>Below one (1) year experience</td><td>4</td></tr><tr><td>No submission</td><td>0</td></tr></tbody></table></div> | Sub-criteria | Points | More than six (6) years -more ' relevant experience | 40 | Five (5)- six(6) years' relevant experience | 32 | Four (4) – five (5) years relevant experience | 24 | Three (3) – four (4) years' relevant experience | 16 | O-2 yeas relevant experience | 8 | Sub-criteria | Points | More than six (6) years' experience | 20 | Between four (4) and six (6) years' experience | 16 | Between three (3) and four (4) years' experience | 12 | Between than one (1) and three (3) years' experience | 8 | Below one (1) year experience | 4 | No submission | 0 | 40 total |
| Sub-criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Points       |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| More than six (6) years -more ' relevant experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | 40           |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| Five (5)- six(6) years' relevant experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 32           |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| Four (4) – five (5) years relevant experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 24           |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| Three (3) – four (4) years' relevant experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 16           |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| O-2 yeas relevant experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 8            |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| Sub-criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Points       |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| More than six (6) years' experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | 20           |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| Between four (4) and six (6) years' experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 16           |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| Between three (3) and four (4) years' experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | 12           |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| Between than one (1) and three (3) years' experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 8            |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| Below one (1) year experience                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 4            |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| No submission                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 0            |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |
| <div><div>• Evidence of competencies:</div><div><div>- Data science competencies</div><div>- Content (environmental workflow) competencies</div><div>- Capacity development, mentoring and training competencies</div></div></div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 40 total     |        |                                                     |    |                                             |    |                                               |    |                                                 |    |                              |   |              |        |                                     |    |                                                |    |                                                  |    |                                                      |   |                               |   |               |   |          |

| Sub-criteria                                                                                  | Points    |  |            |
|-----------------------------------------------------------------------------------------------|-----------|--|------------|
| More than five (5) relevant reference letters with requested supporting documents             | <b>40</b> |  |            |
| Between four (4) and five (5) relevant reference letters with requested supporting documents  | <b>32</b> |  |            |
| Between three (3) and five (4) relevant reference letters with requested supporting documents | <b>24</b> |  |            |
| Between (2) and three (3) relevant reference letters with requested supporting documents      | <b>16</b> |  |            |
| Between (1) and three (2) relevant reference letters with requested supporting documents      | <b>8</b>  |  |            |
| No submission                                                                                 | <b>0</b>  |  |            |
| <b>TOTAL</b>                                                                                  |           |  | <b>100</b> |

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

The second stage will evaluate the price and preference points of those bids that meet the minimum threshold for functionality. The 80/20-point system will be applied in evaluating proposals that qualify for further consideration, where price constitutes 80 points and the B-BBEE Status Level Certificate scores constitutes 20 points

#### **4. Main requirements and Deliverables**

##### **4.1 Timeframe**

The appointed service provider will be expected to commence their duties as soon as the service provider has signed the contract acceptance letter and a Service Level Agreement (SLA).

##### **4.2 Scope of Work**

The successful service provider will need to support the MBI, NBA and BIM teams with technical support and advice on data science related aspects of selected workflows, and ensure skills transfer and capacity building through a structured training programme focussed on key data science needs of ~12 SANBI staff members. Support and advice will cover the following subjects: a) data wrangling with R and Python (cleaning and adapting data for a specific purpose), b) automation of processes and analyses with R, Python and SQL (to ensure repeatability and transparency), c) database design and management (to enhance access and version control), d) data visualisation and record keeping (markdown) and f) web-based reporting tools (dashboards).

The following major activities are envisaged:

- Conduct a user needs assessment for data science related skills with the selected SANBI teams and staff members. To identify the focus areas requiring support within the MBI project, the NBA unit and the BIM

unit. The deliverable for this is a status quo report for data science related skills and a draft support program ~15 days.

- Finalise the support program and develop an implementation schedule in consultation with the unit leaders. In addition, develop appropriate group learning and webinar content and delivery plan to embed the key concepts for which support is to be provided ~15 days.
- Provide support and advisory services on biodiversity indicator databases and workflows as per the program and schedule; records of support and time sheets as deliverables ~70 days

- Complete group training sessions and webinars as per delivery plan. Training / course materials, recordings of sessions as deliverables ~40 days

The first phase of the project will focus on identifying the needs and gaps to be addressed. An initial list of data science topics and subjects is included in Annexure 1, based on previous experience and perceived skills gaps at SANBI; this should act as a guide to the range of data science support needs for this project. Service providers should have experience and capacity to offer support on these topics.

The activities are expected to take place over an 18 month period from the date of project initiation. The appointed Service Provider will work under the supervision of the Lead: National Biodiversity Assessment and the Director: Biodiversity Information Management and Planning at SANBI, and is expected to meet regularly (at SANBI's Kirstenbosch Research Centre and or online). The majority of staff and management involved in the project are based at Kirstenbosch, although online / virtual training options must be available.

## **5. Requirements for Proposals**

### **5.1 Content**

The service provider is required to have extensive experience with all aspects of environmental indicator workflows, from data cleaning and data base design to analysis and automation, to dashboards and visualizations. Experience in training and capacity building, spatial analysis and database management is essential. An added advantage will be knowledge of, or experience with biodiversity specific data and workflows.

Service providers interested in contributing towards this project should submit a concise written proposal that addresses the scope of work and the above requirements and outputs. The proposal must include:

- Proposed work plan for how the Service Provider intends to meet the scope of work.
- Cover letter describing how the Service Provider is qualified and able to meet the requirements of the project detailed above. This should include details of the Service Provider (individual or team), including relevant qualifications, skills and experience – short CV(s) must be included.
- A list of at least three current or recent contracts, preferably in related work so that it provides evidence of the competencies required. The list should detail the nature of the work, the value of the work and contact details of the clients.
- Examples of relevant recent research and writing that the consultant was personally responsible for conceptualising, researching, analysing and writing. Where possible, providing online examples of relevant data science workflows build by the Service Provider, and or access to git repositories showing data cleaning and data visualisation codes.
- Other supporting documents: The Service Provider(s) must provide their proof of registration on the Central Suppliers Database (CSD) of National Treasury, and as such all tax clearance and other requirements must be met. The Service Provider is welcome to provide other supporting documents

not available on the CSD (e.g. BBEE scorecard), if relevant. Evidence of professional registration should be provided in support of any claims.

- f) Budget: Quotations must state the daily and/or hourly rates of the Service Provider per activity outlined in the proposed work plan, with VAT listed separately if applicable. Cell phone, computer expenses and local road travel (e.g. to visit the SANBI Kirstenbosch office) are for the Service Provider's own account. Travel should not be included in the budget and may be arranged separately, in line with SANBI's policies.

## 5.2 Required documents

- a. A current copy of the Central Suppliers Database (CSD) registration report or registration number attainable through registration on the National Treasury Central Suppliers Database (accessed through <https://secure.csd.gov.za>).
- b. Duly signed and fully completed of standard bidding document (SBD) forms.
- c. An original or certified copy of B-BBEE certificate or sworn affidavit.
- d. COIDA certificate

## 6. Nature of appointment and contractual arrangement

Accountability and reporting will be to project manager of the National Biodiversity Assessment as well as the Director for Information Management and Planning.

- The contract will be drawn up between SANBI and the Service Provider stipulating deliverables and deadlines.
- Invoices will be paid for deliverables received as agreed in the contract.
- Invoices must indicate the deliverables produced. No upfront payments will be made.
- SANBI will pay for the satisfactory completion of work within 30 days of date of invoice (addressed to the South African National Biodiversity Institute).

### Notes to suppliers:

- I. The above listed required documents are mandatory
- II. A submission is considered complete when ALL required documents are received by submission deadline
- III. We regret that NO booking forms or contract can be completed before SCM has approved the application to do business with your company and a purchase order has been raised and sent to the appointed service provider
- IV. A purchase order validates SANBI's commitment to do business with your company, therefore, no work can be carried out prior to the supplier receiving a PO from Marketing and Commercialisation Directorate
- V. Kindly note that the approval process may take up to 3 weeks

- VI. The appointed service provider will sign a Service Level Agreement (SLA) and will have a 1x performance assessments

## **7. Confidentiality**

Any or all information made available to the Service Provider by SANBI shall be regarded as confidential and shall not be made available to third parties without the prior written consent of SANBI.

## **8. Preparation of proposal**

SANBI shall not be held liable for any cost that has been incurred by the Service Provider in the preparation of the proposal, the obtaining of certificates or any other cost that might be incurred in submitting the proposal.

## **9. Contract Period**

The consultancy is for approximately 160 days of professional time, split between meetings, support and training. SANBI is to pay for any approved conference workshop related travel separately. The consultancy is expected to run over an 18-month period, so the service provider needs to ensure that they have sufficient capacity to provide approximately 160 days of professional time within this period.

## **10. Compliance reports and meetings**

Both the Service Provider and the Service Recipient will draw up a Service Level Agreement (SLA) for monitoring and compliance purposes. The SLA will be monitored through compliance meetings which will be held every month or more frequently as agreed.

The Service Provider will also meet the Service Recipient as and when it deems necessary.

## **11. General Information**

SANBI may require information relating to the qualification and experience of persons who are proposed or available to provide services. This may include, but is not limited to, resumes, documentation of accreditations, and/or letters of reference.

## **12. SUBMISSION OF PROPOSAL**

**Closing date for submission of responses: 14 October 2022 @ 11:00am**

**Submission of proposals must be emailed to [S.SCM-Quotations@sanbi.org.za](mailto:S.SCM-Quotations@sanbi.org.za) with a copy to Ms Ripfumelo Fumani at [r.fumani@sanbi.org.za](mailto:r.fumani@sanbi.org.za)**

**Further information on the project can be requested via email from Ms Gloria Cupido [g.cupido@sanbi.org.za](mailto:g.cupido@sanbi.org.za)**

**Emailed applications must not be more than 6MB in size.**

**Note: Late submissions will be disqualified.**

### 13. Annexure 1

Initial list of data science related topics relevant to this consultancy

| Topic                                                                                                 | Notes                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Relational and non relation database design and management, including spatial databases. SQL querying | <p>PostgreSQL (Postgres) and MS Structured Query Language (SQL) Server.</p> <p>Components of SQL and options available with various database implementations.</p> <p>Using spatial databases in R and Python workflows, and using advanced spatial tools within the database environment. Database design principles. [In addition to training, the support and advisory time will likely include database design and build]</p> |
| Python – data wrangling, graphics, streamlit apps and dashboards                                      | <p>Introduction to object oriented programming with Python. Entry level and advanced Python for spatial analysis – i.e. with in QGIS and using ArcPy. Automation and loops (iterators). Plus some “dashboard” (eg streamlit) modules. [In addition to training, the support and advisory time will likely include automation of workflows]</p>                                                                                   |
| R – data wrangling, graphics, R Markdown, Shiny                                                       | <p>Entry level and advanced R plus R Markdown modules for generating technical reports. Shiny apps for displaying data for users. Data wrangling, automation and loops (iterators), and basic plots.</p>                                                                                                                                                                                                                         |
| Version Control                                                                                       | Data Version Control for spatial data and databases                                                                                                                                                                                                                                                                                                                                                                              |
| Building workflows, integrating tools                                                                 | <p>Building automated workflows, linking steps in the workflow and using the right tool for each step.</p> <p>Introduction to containerisation / docker for workflow reproducibility.</p>                                                                                                                                                                                                                                        |
| Version Control for code and workflows                                                                | Git                                                                                                                                                                                                                                                                                                                                                                                                                              |
| REST API                                                                                              | <p>Training and advice on creating and maintaining server and front-end based Application Programming Interface (API) services. SANBI is increasingly using APIs to deliver on data integration and this raises a variety of security challenges such as sensitive data sharing or automated bot attacks.</p>                                                                                                                    |



**Consent form in terms of section 11 of the Protection of Personal Information Act No 4 of 2013 (POPIA)**

In order for the South African National Biodiversity Institute (SANBI) to consider the bidder's response to the RFQ / RFP to become a service provider of the SANBI, it will be necessary for the SANBI to process certain personal information which the service provider may share with SANBI for the purpose of the RFQ / RFP, including personal information, which may include special personal information (all hereafter referred to as "Personal Information")

The SANBI will process the Service Provider's Personal Information in accordance with the SANBI Privacy Policy.

*Access to your Personal Information and purpose specification*

Personal Information will be processed by SANBI for purposes of assessing the service provider's submission in relation to the RFQ / RFP i.e. the purposes of assessing current services required by the SANBI. We may also share the service provider's Personal Information with third parties, both within the Republic of South Africa and in other jurisdictions, including to carry out verification, background checks and Know Your Customer obligations in terms of the Financial Intelligence Centre Act, No. 38 of 2001 ("FICA"). In this regard, the service provider acknowledges that SANBI's authorised verification agent(s) and service providers will access Personal Information and conduct background screening.

*Consent*

By [ticking/clicking] "Yes" and signing below, you agree and voluntarily consent to the SANBI's processing of the service provider's Personal Information for the purposes of evaluating its RFQ / RFP submission, including to confirm and verify any information provided in the submission and service provider gives SANBI permission to do so. The service provider understands that it is free to withdraw its consent on written notice to SANBI and the service provider agrees that the Personal Information may be disclosed by the SANBI to third parties, including SANBI's affiliates, service providers and associates (some of which may be located outside of the Republic of South Africa). Please note that if you withdraw your consent at any stage, we may be unable to process your RFQ / RFP.

Yes ☐

No ☐

---

Supplier Name

---

Date

---

Signature

---

Authorised representative, who warrants that he/she is duly authorised.