

**PART A
 INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR THE REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)					
BID NUMBER:	SANBI: Q9679/2023		CLOSING DATE:	23 October 2023	CLOSING TIME: 11h00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER AS AN EXPERT ADVISOR ON WATER SECTOR POLICY TO PROVIDE TECHNICAL AND PROJECT MANAGEMENT SUPPORT TO THE ECOLOGICAL INFRASTRUCTURE FOR THE WATER SECURITY PROJECT				
	Please state the Bid number as the reference number on the subject line when responding to the RFQ.				
Submission of proposals: Proposals must be emailed to S.SCM-Quotations@sanbi.org.za with a copy to Ms. K. Hlatshwayo at K.Hlatshwayo@sanbi.org.za					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Khanyisile Hlatshwayo		CONTACT PERSON	Jenifer Zungu	
TELEPHONE NUMBER	012 843 5163		TELEPHONE NUMBER	012 843 5000	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	K.hlatshwayo@sanbi.org.za		E-MAIL ADDRESS	J.Zungu@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 ☐ Yes ☐ No		[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]
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, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA .
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

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

DATE:

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

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SBD 4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is

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.

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 they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

- 3.1 I have read, and I understand the contents of this disclosure.
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement, or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.5 There have been no consultations, communications, agreements, or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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.

- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	
Signature	Date
.....	
Position	Name of bidder

SBD 6.1

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PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

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

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

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim regarding preferences, in any manner required by the organ of state.

2. DEFINITIONS

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

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

Where?

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

$$\begin{array}{ccc} 80/20 & \text{or} & 90/10 \\ Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) & \text{or} & Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right) \end{array}$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Categories of persons historically disadvantaged by unfair discrimination based on race - Information will be verified on CSD report. Points will be allocated based on the percentage of ownership per goal. 100% Black ownership = 10 points	10	
Categories of persons historically disadvantaged by unfair discrimination based on gender. Information will be verified on CSD report. Points will be allocated based on the percentage of	10	

ownership per goal.		
100% Female ownership = 10 points		

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct.
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form.
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct.
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process.
 - (b) recover costs, losses, or damages it has incurred or suffered as a result of that person's conduct.
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation.

- (d) recommend that the tenderer or contractor, its shareholders, and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....	
SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	
DATE:	
ADDRESS:	
	
	
	
	

TERMS OF REFERENCE

APPOINTMENT OF A SERVICE PROVIDER AS AN EXPERT ADVISOR ON WATER SECTOR POLICY TO PROVIDE TECHNICAL AND PROJECT MANAGEMENT SUPPORT TO THE ECOLOGICAL INFRASTRUCTURE FOR WATER SECURITY PROJECT

Postal Address: Private Bag X101, Pretoria, 0001, RSA
**Physical Address: Aloe Lodge Pretoria National Botanical Garden,
2 Cussonia Avenue, Brummeria, Pretoria**

Quotation Number: Q9679/2023

1. Background

The South African National Biodiversity Institute (SANBI), in collaboration with the Development Bank of Southern Africa (DBSA), received approval to implement a GEF (Global Environment Facility) funded project entitled “Unlocking Biodiversity Benefits through Development Finance in Critical Catchments”. The local name for the project is the “Ecological Infrastructure for Water Security project” and it aims to improve water security through integrating biodiversity and ecosystem services into infrastructure development in the water sector.

The project will implement interventions at two levels, namely: (a) national policy and institutions (the enabling level), and (b) pilot interventions in two catchments (demonstration). The stated objective of the project is to develop policy and capacity incentives for mainstreaming biodiversity and ecosystems values into national, regional and local development policy and finance (demonstrated in two catchments). The project seeks, among other things, to enable the integration of biodiversity and ecosystem services into water sector planning, finance, and development through strategically addressing the policies that guide interventions and the regulations and planning tools that give effect to policy. The strategic results framework that guides this work was developed during the project design phase in 2016. The project recognizes subsequent changes in water policy, regulatory instruments, and institutional arrangements, particularly with respect to catchment management agencies.

Project implementation has been underway since 2018 and a water policy specialist is required to support reviewing relevant policy frameworks, regulatory instruments, and planning tools to enable the integration of biodiversity and ecosystems services into water sector planning, finance, and development.

2. Objectives of the work

SANBI requires the services of a water policy specialist to provide support to the Ecological Infrastructure for Water Security Project in work on relevant policy frameworks, regulatory instruments and planning tools that enable integration of biodiversity and ecosystem services into water sector planning, finance, and development.

3. Requirements of the service provider

The successful service provider will be responsible for the following activities in line with the above objective:

- a) Provide expert advice to the Project Leader, Water Policy Advisor, and project team on water policy related matters.
- b) Provide structured inputs regarding ecological infrastructure objectives into applicable policy and frameworks, including support towards improved practice of setting water use license conditions (particularly for developments with significant water impacts) including requirements for implement ability, the minimum information required in order to process and issue a water use licenses, strengthen and align the conditions for developments with significant water impacts, especially for mitigation and proactive ecological infrastructure management that benefits water security.
- c) Support work with CMAs to reconcile value of downstream water services and costs of ecological infrastructure rehabilitation and maintenance within water pricing structures and water resource plans (CMS's) which include ecological infrastructure.
- d) Provide support to the development of the National Wetland Policy
- e) Support work with DWS and the demonstration catchments to implement the water pricing strategy progressively and collaboratively to the benefit of ecological infrastructure management activities in specific catchments, and improved water security in general.
- f) Participate in project workshops, quarterly meetings and stakeholder engagement events as required.
- g) Support facilitation at workshops for detailed work planning with implementing partners.
- h) Support coordination with implementing partners and other stakeholder organisations in the water value chain.

4. Deliverables

The service provider will be appointed for 33 days over a 12-month period, commencing in May 2023 or as close to this date as possible. The service provider will be required to submit:

- Work plan indicating how the requirements of the ToR will be delivered.
- Review of recent changes in national water policies, strategies and regulatory instruments and institutional arrangements material to the EI4WS Project.
- Support the EI4WS project team with detailed work planning with implementing partners to enable integration of biodiversity and ecosystem services into water sector planning, finance, and development through strategic inputs into relevant policy frameworks, regulatory instruments and planning tools, including implementing the water pricing strategy to benefit ecological infrastructure management activities in specific catchments.
- Support with the development of scope of work for identified activities in the demonstration catchments.
- Support with the development of the National Wetland Policy
- Review of current draft of Wetland Policy into a first draft, including an expert workshop and compiling inputs from the workshop
- Input into wetland policy comparison report

- Support coordination and engagement with relevant partner organisations nationally and in the demonstration catchments.
- Brief monthly progress reports.

5. Skills and competency required.

To fulfil this role, the service provider requires the following skills and competencies. The response to the terms of reference should indicate the extent to which the service provider fulfils these requirements. In addition, proposals should include a recent CV.

- **Qualifications, knowledge, experience, and skills are required in:**
 - Postgraduate qualification, ideally at master's level, in environment/natural resources, public policy, water or related field coupled with 10 to 15 years relevant experience as articulated below.
 - Current knowledge and extensive experience of the range of policy and regulatory frameworks, as well as implementation systems, linked to integrated water resource management, water sector infrastructure development, investment, and service delivery at national and catchment level within South Africa.
 - Understanding of mainstreaming biodiversity/environmental concerns into other sectors
 - Experience of developing, advising, or reviewing regulatory frameworks and supporting implementation
 - Experience of participatory/collaborative project planning with implementing partners
 - Experience in working with relevant regulatory bodies/organisations and catchment level stakeholders and structures, including relevant government departments (national, provincial, and municipal), NGOs, private sector organisations etc.
 - Stakeholder engagement and partnership management
 - Comfortable to work collaboratively within teams.
 - Good track record of project management and delivery including working independently and delivering efficiently on high quality and accurate deliverables within tight agreed timeframes.
- **The following will be an added advantage:**
 - Familiarity with GEF biodiversity mainstreaming projects and project design requirements

The service provider must be willing to travel nationally for meetings as required and have a valid driver's licence.

The successful service provider will be required to familiarise themselves with all existing project documentation.

6. Requirements for proposals

Service providers interested in contributing to this work should submit a concise written proposal that

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addresses the scope of work and the above requirements and outputs.

The proposal must include:

- Details of the Service Provider, including relevant skills, experience, and track record, responding to the main requirements and skills and competencies required as outlined above.
- At least three examples of projects undertaken where policy input was developed and taken up as part of finalized policy products
- At least two examples of written work in which the service provider was the lead author.
- Contact details of at least three current or recent clients, preferably in related work.
- A budget for the proposed work, including VAT, that is clearly split between professional services and disbursements. For the disbursements section, please note that telephone and computer expenses are for the Service Provider's own account, but travel costs and incidental expenses can be claimed directly from SANBI in line with SANBI's policies and rates. All disbursements must be approved prior to incurring costs.

All responses received will be verified for compliance and completeness of the submitted proposal per below set of mandatory requirements.

- SBD form 1, 4 and 6.1
- The equity status of the interested party per the attached form SBD 6.1
- A copy of the Central Suppliers Database (CSD) registration report
- Evidence of professional registration should be provided in support of any claims (e.g., SACNASP).
- Letter of Good Standing from the office of Compensation as required by the Compensation for Occupational Injuries and Diseases Act (COIDA). The letter should be issued by the Department of Labour.

7. Evaluation criteria

The Preferential Procurement Policy Framework Act (No. 5 of 2000) and SANBI's procurement process apply to these Terms of Reference. Note that Service Providers are required to comply with the processes outlined here and failure will result in the disqualification of proposals:

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

Those proposals passing the functionality threshold** below will go into an evaluation on price and equity.

Criteria for measuring functionality		Weight				
1. Technical merit of the proposal: • Demonstrated understanding of the requirements • Approach, deliverables, and timeframes		30 total (15) (15)				
2. Proven track record: • Qualifications and relevant experience		30 total				
<table><tr><th>Sub-criteria for qualifications</th><th>Points</th></tr><tr><td>Master's Qualification in environment/natural resources, public policy, water, or related field with</td><td>10</td></tr></table>		Sub-criteria for qualifications	Points	Master's Qualification in environment/natural resources, public policy, water, or related field with	10	(10)
Sub-criteria for qualifications	Points					
Master's Qualification in environment/natural resources, public policy, water, or related field with	10					

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10-15 years relevant experience			
Honours qualification environment/natural resources, public policy, water, or related field with 15 to 20 years' relevant experience	8		
No post graduate qualification, less than 15 years relevant experience	0		
- Proven track record in project delivery within deadlines and budget - Relevant examples of previous work			
Sub-criteria for previous work examples		Points	
3 or more relevant examples of previous work		15	(5)
1 relevant example of previous work		5	
No relevant examples		0	(15)
3. Evidence of competencies:			40 total
- Familiarity with water sector policies, regulatory frameworks, strategies, and plans - Experience in working with and leading policy processes (i.e., policy conceptualization, policy development, stakeholder processes, legal review, policy review, gazetting)			(10)
			(15)
Sub-criteria for policy process experience		Points	
Policy conceptualization, policy development, stakeholder processes, legal review, policy review, gazetting		15	
Policy conceptualization, policy development, stakeholder processes and legal review experience		10	
Policy conceptualization and policy development experience		5	
No policy experience		0	
- Facilitation skills - Writing skills, especially of formal policy content			
Sub-criteria for writing skills in policy content		Points	
Extensive formal policy content writing experience		10	(5)
Some formal policy content writing experience		5	

No formal policy content writing experience	0	(10)
TOTAL		100

**** Service Providers who fail to score a minimum of 70 points out of 100 points on 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. In accordance with the Preferential Procurement Regulations, 2022 pertaining to the Preferential Procurement Policy Framework Act (No. 5 of 2000), a maximum of 20 points will be awarded based on the identified specific goals (see below table).

However, as the price is not relevant to this Proposal, the second stage of evaluation of bids will focus solely on specific goals points.

Specific Goals	Points
a) Categories of persons historically disadvantaged by unfair discrimination based on race. - Information will be verified on CSD report. Points will be allocated based on the percentage of ownership per goal. 100% Black ownership	10
b) Categories of persons historically disadvantaged by unfair discrimination based on gender. Information will be verified on CSD report. Points will be allocated based on the percentage of ownership per goal. 100% Female ownership = 10 points	10
TOTAL	20

8. REPORTING REQUIREMENTS AND MANAGEMENT

Accountability will be to the Project Leader and the EI Coordinator: Greater uMngeni of the EI4WS Project. Responsibility for contract management and other day-to-day direction may be delegated as required.

The service provider will also meet with the project team and implanting partners as necessary.

All written deliverables must be submitted in MS Office and/or PDF, as appropriate.

9. CONTRACTUAL ARRANGEMENTS

The contract will be drawn up between SANBI and the Service Provider.

Invoices will be paid on completion of planned deliverables that are produced in accordance with the contract. No up-front payments will be made.

SANBI will pay for the satisfactory completion of work within 30 days of submission of invoices. In the case of invoices to SANBI, they must be addressed to the Project Leader: EI4WS.

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10. PROPOSAL SUBMISSIONS

Closing date for submission of proposals: 11h00 on 23 October 2023. Late submissions will be disqualified. Submission of proposals: proposals must be emailed to S.SCM-Quotations@sanbi.org.za with a copy to Ms. Khanyisile Hlatshwayo K.hlatshwayo@sanbi.org.za

Requests for further information on this TOR must be emailed to J.Zungu@sanbi.org.za or made by telephone on 012 843 5000.