SANBI
Biodiversity for Life
South African National Biodiversity Institute

SBD1

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)					
BID NUMBER:	**Q11868/2025**	CLOSING DATE:	**27 February 2026**	CLOSING TIME:	**11:00am**
DESCRIPTION	**APPOINTMENT OF A SERVICE PROVIDER FOR EXTERNAL AUDITOR TO UNDERTAKE A FINANCIAL AUDIT OF THE "SCALING UP ECOSYSTEM-BASED APPROACHES TO MANAGING CLIMATE-INTENSIFIED DISASTER RISKS IN VULNERABLE REGIONS OF SOUTH AFRICA" ("ECO-DRR") PROJECT FOR THE 6 MONTH PERIOD**				

Submission of proposals: proposals must be emailed to S.SCM-Quotations@sanbi.org.za with a copy to Ms. Giyama at N.Giyama@sanbi.org.za

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		TECHNICAL ENQUIRIES MAY BE DIRECTED TO:	
CONTACT PERSON	Noloyiso Giyama	CONTACT PERSON	Sharon Bean
TELEPHONE NUMBER	012 339 2750	TELEPHONE NUMBER	(021) 799 8633
FACSIMILE NUMBER	N/A	FACSIMILE NUMBER	N/A
E-MAIL ADDRESS	N.Giyama@sanbi.org.za	E-MAIL ADDRESS	S.Bean@sanbi.org.za

SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	TICK APPLICABLE BOX] ☐ Yes ☐ No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] ☐ Yes ☐ No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR **THE GOODS /SERVICES /WORKS OFFERED**?	☐Yes ☐No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	

QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO

DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO **IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.**

PART B

TERMS AND CONDITIONS FOR BIDDING

1.	**BID SUBMISSION:**
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	**ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
1.3.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4.	**THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**
2.	**TAX COMPLIANCE REQUIREMENTS**
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE **Error! Hyperlink reference not valid.**.
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

SBD4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	**Identity Number**	**Name of State institution**

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

2.2.1 If so, furnish particulars:

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

2.3.1 If so, furnish particulars:
……………………………………………………………………………………

3 DECLARATION

[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.

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

3.1 I have read and I understand the contents of this disclosure;
3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium2 will not be construed as collusive bidding.
3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

[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.

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

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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 in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

(a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

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

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:

80/20 or **90/10**

$$\boldsymbol{Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)}$$ or $$\boldsymbol{Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)}$$

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:

80/20 **or** **90/10**

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

Where

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

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals 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 on the basis of 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 on the basis of 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	

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: ………………………………………………………

………………………………………………………

………………………………………………………

………………………………………………………

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

____

Authorized representative, who warrants that he/she is duly authorized

TERMS OF REFERENCE

EXTERNAL AUDITOR TO UNDERTAKE A FINANCIAL AUDIT OF THE "SCALING UP ECOSYSTEM-BASED APPROACHES TO MANAGING CLIMATE-INTENSIFIED DISASTER RISKS IN VULNERABLE REGIONS OF SOUTH AFRICA" ("ECO-DRR") PROJECT FOR THE 6 MONTH PERIOD

Postal Address: Private Bag X7, Claremont 7735
Physical Address: Centre for Biodiversity Conservation, Kirstenbosch National Botanical Garden, Rhodes Drive, Newlands

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1. INTRODUCTION AND BACKGROUND

SANBI was accredited as a Direct Access Entity of the Green Climate Fund (GCF) in 2016. This allows SANBI to work with partners to develop funding proposals for submission to the GCF Board, and should the proposals be approved, oversee the implementation of the projects in its capacity as an Accredited Entity of the Fund. In July 2025 the first of these proposals, for a project entitled "*Scaling up ecosystem-based approaches to managing climate-intensified disaster risks in vulnerable regions of South Africa" (or the "Eco-DRR project")* was approved and is now under implementation. The Eco-DRR project is an eight-year initiative funded by a USD 40m grant from the GCF.

SANBI will act as both the Accredited Entity, responsible for oversight of the project, and the Executing Entity for the project, responsible for the day-to-day management and implementation of project activities.

The Accredited Entity is based at Kirstenbosch National Botanical Gardens in Cape Town, and the Executing Entity is based in the Pretoria National Botanical Gardens. However, the audit will be for the Executing Entity grant only.

2. OBJECTIVES

SANBI requires the services of an independent external auditor to undertake the financial audit of the inception period of the project, for the 6 months, for the Executing Entity activities.

The objectives of the audit of the project financial statements are to enable the auditor to express an opinion on:

- whether the project financial statements (including the notes thereto and supplementary statements) present fairly, in all material respects, (or give a true and fair view of) the grant financial position for the 6 months period, and its cash flows for the 6 months then ended, in conformity with the accounting standards acceptable to the GCF.
- whether the proceeds of the grant were used for the intended purpose in compliance with the expenditure categories per agreed budget lines of the approved Funding Proposal, and in alignment with the scope of activities approved for the project; and
- whether the project has complied with the covenants stated in the Accredited Master Agreement (AMA) SANBI entered into with the GCF in July 2017 when it was registered as an Accredited Entity, as well as the Funded Activity Agreement (FAA), entered into in July 2025 for the implementation of the Eco-DRR project.

The financial statements will contain:

- The dates and amounts disbursed for Funded Activities, for the period reported and cumulative amounts up to the period, broken down by each Funded Activity, and compliance with financial covenants.
- The actual expenditures for the Funded Activities for the period reported and cumulative amounts up to the period, broken down by each Funded Activity.
- A statement of Investment Income earned on GCF Proceeds, as well as the amount of such Investment Income paid to the Fund.

3. MANAGEMENT LETTER

A management letter providing the auditor’s observations and findings on accounting records, systems and internal controls that were examined during the audit, including:

- Weaknesses and issues in accounting and internal control systems, including irregularities in the use of grant funds, ineligibility of expenditures, and procurement-related weaknesses and issues.
- Auditor’s assessment of the causes, and recommendations to improve or rectify the identified weaknesses and issues.
- SANBI’s responses to the weaknesses and issues, including explanations of the causes, a proposed action plan to address the concerns, and the timeline for completion.
- Status of weaknesses and issues identified and reported in prior periods.
- Any continuing or persistent issues and weaknesses, and follow-up actions taken.
- Any matters the auditor considers pertinent or significant as to impact implementation.

4. ACCOUNTING AND AUDITING STANDARDS

The financial statements will be prepared on an accrual basis of accounting in accordance with the South African framework of standards for public sector entities being the Generally Recognized Accounting Practice (GRAP).

The audit will be conducted in accordance with International Standards on Auditing (ISA).

5. AUDITOR QUALIFICATIONS

The auditor must satisfy the following minimum requirements:

- A legal entity in South Africa with a business license granted by the appropriate authority.
- A member of a professional body affiliated with the International Federation of Accountants or the International Organization of Supreme Audit Institutions.
- Have adequate relevant professional and educational qualifications or be able to provide audit staff with adequate qualifications, experience, and competence.
- Technically competent and able to conduct an audit in line with the auditing standards.
- Objective and independent from the project, its staff, and activities, and from all aspects of management or financial interests of SANBI.
- Possesses proven track record in financial audit of public sector projects, or audits of similar nature, type, and complexity, or donor-funded projects.

6. NATURE OF APPOINTMENT AND CONTRACTUAL ARRANGEMENTS

The auditor will:

- Provide a quote according to the project audit specifications as set out in this ToR by the submission date set out below.
- Provide an audit plan with the price quote, detailing the start and end dates of the audit.
- The contract will be structured such that payment will be made on presentation of an invoice at the end of the audit.

7. REQUIREMENTS FOR APPLICATIONS

Service providers interested in this audit should submit a concise quotation for undertaking the assignment.

The quotation must include:

- Details and CVs of the individual/s (not more than 5 pages each) who will provide the service, including relevant skills, experience and track record, responding to the main requirements and skills and competencies required as outlined above.
- Expertise and competencies of the Engagement partner
- Scope of work and scale of current and/ or past projects undertaken in providing similar services.
- Company Experience Company profile including demonstrated years' experience in providing external audit services in the public sector for international donors.
- List of audit contracts of current and assignments undertaken in providing audits services of public sector projects, or audits of similar nature, type, and complexity
- At least 5 traceable reference letters of current and or previous organisations in providing similar services (minimum of 5 reference letters).
- **A financial breakdown that clearly states the daily rate of the key personnel** within the team i.e. Engagement Partner, Audit Senior and Audit Clerks. The detailed costs should include VAT.

To assist in determining your quote, it should be noted that there are not likely to be payroll costs, **and not more than a total expenditure of R350,000 to be audited**, most of which will be travel related. There is a USD CFC bank account which earns interest.

It is expected that the audit will be conducted remotely.

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:

- Service providers are required to submit a **valid tax clearance certificate** with their proposals (see SBD 2 form). Where the service provider is not in possession of a valid tax clearance certificate, this should be applied from SARS in good time ahead of the proposal deadline.

8. MANDATORY REQUIREMENTS

The service provider is expected to attach the following documents and is compulsory:

(a) SBD 1, SBD 4 and SBD 6.1
(b) CSD report not later than 3 months.
(c) Comprehensive CV
(d) Qualifications
(e) SAICA Certification
(f) Formal Quotation on Company letterhead

Failure to attach the above documents will lead to your bid being disqualified

9. EVALUATION CRITERIA:

The service provider will be evaluated in 2 phases

Phase 1 - Functionality
Proposals passing the functionality threshold** below, will go into an evaluation on price and equity.

Criteria for measuring functionality	Weight
1. CV's and qualifications of personnel assigned to the SANBI project. Minimum of 4 staff are assigned to the audit, with a detailed CV of each of the staff. • Engagement Partner with CA (SA) qualification and IRBA membership, and audit team comprising Senior Auditor with Honours degree in accounting; and 2 clerks with bachelor's degree in accounting qualifications = 30 • Engagement Partner with CA (SA) qualification and IRBA membership, and audit team comprising Senior Auditor with Honours degree in accounting and 1 clerk with bachelor's degree in accounting qualification = 20 • Engagement Partner with CA (SA) qualification and IRBA membership, and audit team comprising Senior Auditor with bachelor's degree in accounting and 2 clerks with diploma in accounting qualifications = 10 • No CA (SA) on the team = 0	**30**
2. Expertise and competencies of the personnel assigned to the SANBI project. Number of years of experience: • Engagement Partner with 5+ years' experience = 20 • Engagement Partner with 3-5 years' experience = 10 • Engagement Partner with 1-3 years' experience = 5	**20**
3. Company Experience Company profile including demonstrated years' experience in providing external audit services in the public sector for foreign donor funded projects Less than 2 years of relevant experience = 0 points Two to 4 years of relevant experience = 5 points Four to 6 years of relevant experience = 10 points Above 6 years relevant experience = 15 points	**15**
4. List of audit contracts of current and assignments undertaken in providing audits	**25**

	services of public sector projects, or audits of similar nature, type, and complexity, or foreign donor-funded projects. • 5+ foreign donor-funded project audits and 5 public entity audits =25 • 3-5 foreign donor-funded project audits and 3-5 public entity audits =15 • 1-3 foreign donor-funded project audits and 1-3 public entity audits =10	
5	Reference letters of current and/or previous (contactable) public entity organizations for which a similar service was provided (i.e. foreign donor funded audits (minimum of 5 reference letters) • 5 reference letters and more = 10 • 2-4 reference letters = 5 • Less than 2 reference letters = 0	**10**
TOTAL		**100**

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

Phase 2 - Price

Service providers who have scored a minimum of 70 points will be selected for phase two.

Organizational Procurement goals and Pricing

In accordance with stipulated guidelines provided by National Treasury and that SANBI as an organ of the state is required to comply with section 10 (b) of the B-BBEE Act and to implement organizational “Specific Goals” pertaining to preferential procurement policy. The revised 80 / 20-point system is to be applied with this procurement evaluation, where price contributes 80 points and the maximum of 20 points will be awarded based on stipulated SANBI’s Specific Goals as defined below:

Specific goals:

Specific goals	**Objective points score**
Categories of persons historically disadvantaged by unfair discrimination on the basis of race - 100% black ownership (CSD	**10**
Categories of persons historically disadvantaged by unfair discrimination on the basis of gender - 100% female ownership (CSD	**10**
TOTAL	**20 Points**

Note: if supporting documents are not provided for evaluation the allocated score would be “zero”, or where the provided documents are ambiguous and/or unclear to evaluate requiring that assumptions are to be made, to clarify the provided documentation the allocated score would be “zero”.

With a “Zero” rating it does not disqualify the bidder from the bidding process. The bid will be awarded the highest

10. CONTRACTUAL ARRANGEMENTS

The contract will be drawn up between SANBI and the service provider.

Accountability will be to the SANBI Chief Director: Adaptation Policy and Resourcing.

Responsibility for contract management and other day-to-day directions may be delegated as required.

All written deliverables must be submitted to MS Office and/or PDF and/or design package format, as appropriate.

Invoices will be paid on completion of planned deliverables that are produced in accordance with the contract.

SANBI will pay for the satisfactory completion of work within 30 days of submission of invoices. In the case of invoices submitted to SANBI, they must be addressed to the Chief Director: Adaptation Policy and Resourcing.

Copyright is retained by SANBI.

11. SUBMISSION OF PROPOSAL

Proposals should be emailed to S.SCM-Quotations@sanbi.org.za with a copy to N Giyama@sanbi.org.za

Closing date for submissions: **27 February 2026@11h00am**

Emailed applications must not be more than 10MB in size.

Request for further information to these specifications must be emailed to: