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SBD1

PART A
INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE)					
RFQ NUMBER:	**Q12032/2026**	CLOSING DATE:	28 September 2026	CLOSING TIME:	**11:00AM**
DESCRIPTION **THE APPOINTMENT OF A SERVICE PROVIDER TO PERFORM THE PROBITY REVIEW FUNCTION AT THE SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE**					
BID RESPONSE DOCUMENTS MAY BE E-MAILED TO BELOW ADDRESSES:					
Submission of proposals: Proposals must be emailed to **S.SCMQuotations@sanbi.org.za** copy **k.hlatshwayo@sanbi.org.za** **Failure to send to the above email address will result in your bid being disqualified.** **Please state the Bid number as the reference number on the subject line when responding to the RFQ**					

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO		**TECHNICAL ENQUIRIES MAY BE DIRECTED TO:**	
CONTACT PERSON	Khanyisile Hlatshwayo	CONTACT PERSON	Rofhiwa Netshiwani
TELEPHONE NUMBER	012 002 5336	TELEPHONE NUMBER	N/A
FACSIMILE NUMBER	n/a	FACSIMILE NUMBER	**n/a**
E-MAIL ADDRESS	k.hlatshwayo@sanbi.org.za	E-MAIL ADDRESS	R.Netshiwani@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				

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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]2

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	ARE YOU A FOREIGN ☐ Yes ☐ No **/SERVICES** [IF YES [IF PROOF]	BASED SUPPLIER FOR **THE GOODS** YES, ANSWER THE ENCLOSE **/WORKS OFFERED?**	☐Yes ☐No 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 RETYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**

1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.

2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.

2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.

2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.

2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.

2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

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

DATE: ……

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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 interest[1] 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:

[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.

……
……

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

2.3.1 If so, furnish particulars:

……
……

3 DECLARATION

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

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium[2] 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

[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.

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

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SBD 6.1

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**

$$Ps = 80\left(1 - \frac{Pt - Pmin}{Pmin}\right) \quad \text{or} \quad Ps = 90\left(1 - \frac{Pt - Pmin}{Pmin}\right)$$

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**

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

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)**
1. Categories of persons historically disadvantaged by unfair discrimination on the basis of race. 100% black ownership **(Points will be allocated based on the percentage of ownership per goal. Information will be verified on CSD. CSD must be attached as proof)**	10	
2. Categories of persons historically disadvantaged by unfair discrimination on the basis of gender. 100 % female ownership **(Points will be allocated based on the percentage of ownership per goal. Information will be verified on CSD. CSD must be attached as proof)**	10	
Total	20	

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**: …… ……

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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.

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REQUEST FOR QUOTATION

THE APPOINTMENT OF A SERVICE PROVIDER TO PERFORM THE PROBITY REVIEW FUNCTION AT THE SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE

Ref No.: SANBI**: Q12032/2026**

1. INTRODUCTION

SANBI seeks to appoint a professional service provider to perform its Probity or compliance review function services for tenders, in line with the scope outlined in the Terms of Reference. These Terms of Reference describe the objectives, scope of work, requirements, deliverables, roles, and responsibilities.

2. BACKGROUND

The South African National Biodiversity Institute (SANBI) is a schedule 3A public entity organization as defined by the Public Finance Management Act (Act 1 of 1999). SANBI derives its mandate from the National Environmental Management Biodiversity Act (Act 10 of 2004). SANBI's Probity review function will report to the SANBI Internal Audit to promote and ensure the following:

- The independence of the Probity Review Service function

3. PURPOSE AND OBJECTIVE

The purpose of this assignment is to appoint a suitable experienced Independent Probity Review Service Provider that can provide and maintain an appropriate Probity review Service to the South African National Biodiversity Institute (SANBI).

The Probity review Function should be an independent appraisal function within SANBI, which provides management with a compliance review function for all tender processes within the Institution.

The objective of the probity review Service is to add value by assisting the Supply Chain Management (SCM) in effectively discharging their responsibilities, including the promotion of effective controls within the provisions of the Public Finance Management Act (PFMA) and Treasury Regulations.

4. INVITATION TO QUOTE

The quotation closes on 28 September 2026

Service Providers are hereby invited to provide SANBI with an appropriate Probity review function.

The process will be coordinated by SANBI's Supply Chain Management (SCM) department, contactable at the following address:

Deputy Director: Supply Chain Management

5. SCOPE OF WORK

The scope of work entails evaluating the adequacy and effectiveness of the organization's process of internal control. This includes the following functions:

To evaluate the compliance of the process followed for the SANBI Procurement process in relation to the prevailing Supply Chain Management policies, legislation, and regulations.

The successful service provider will be required to do a probity review on tenders as follows:

- Review of compliance report on all tenders received.
- The service provider should check if the evaluation scoring was done in line with the advertised criteria, ensure that the process of evaluation is as prescribed by the PFMA and the Constitution of the Republic.
- That evaluation criterion used is applied consistently in the bid in question.
- The service provider should check the accuracy of the evaluation and consolidation reports produced.
- Obtain, analyze, interpret, and document information to support the outcomes of the process followed.
- Review and assess all relevant documentation to ensure compliance.
- Ensure that risks that may affect SANBI from the award process are identified and addressed accordingly, within the scope of the bid evaluation committee, and advise on any matters that may render the integrity of the process questionable.
- Recommend the implementation of appropriate remedial measures where deficiencies are identified.
- Prepare a written recommendation report on the outcome of the probity review.

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6. TECHNICAL REQUIREMENTS

6.1 Service providers interested in quoting should be those that:

- Have an extensive understanding of the probity review
- Will be able to deliver on their obligation in respect of this project as required in terms of the scope

6.2 Personnel to be assigned to this project must meet the following requirements:

- Relevant academic qualifications
- Are active members of the Institute of Internal Auditors (IIASA)/South African Institute of Chartered Accountants (SAICA)
- Have a thorough understanding of references to governance, risk management, and internal controls in the Public Finance Management Act (PFMA) and Treasury Regulations
- Project Management skills and experience
- High levels of communication, interpersonal, and analytical skills

- The ability to work under pressure
- Attention to detail and deadlines

7 MANDATORY REQUIREMENTS / DOCUMENTS

Quotations must include the following documentation (Failure to submit the required documentation WILL lead to disqualification):

- Duly completed and signed SBD forms (1,4 and 6.1)
- A copy of the Company Central Supplier Database (CSD) registration report • Fee/cost structure
- Proof of **active** registration/Affiliation with SAICA or IIA and must be attached for the Project Leader.
- Proof of **active** registration/Affiliation with the following regulatory bodies IRBA or IIA or SAICA or CIPS or SAIGA for the two Probity Auditors.

8 ADDITIONAL INFORMATION REQUIRED

The following information is required in the proposal document to ensure that an evaluation can be conducted:

- Strategy and plan for the Probity engagement and review engagement (Provide a detailed technical approach, methodology, and detailed work breakdown structure for probity audit and review)
- A proposed plan/Methodology of action and demonstrate the ability to carry out the scope of work
- Demonstration of knowledge and understanding of the Public Service Regulatory Framework

- Details of experience and capacity of resources to fulfil the services required in terms of the scope of work SANBI
- The bidder must submit detailed CVs of the team that they intend to allocate for probity audit assignments, demonstrating qualifications, skills, expertise, and experience.

- Company Experience in providing audit services in the Public Sector
- List of three (3) current and/or past projects undertaken in the last five (5) years in providing probity review services within the Public Sector.
- Three (3) written references of traceable current and/or previous Public Sector organizations serviced in providing similar services in the last five (5) years.

9. EVALUATION PROCESS

Bids will be evaluated in accordance with the prescripts of the Preferential Procurement Policy Framework Act (PPPFA, Act 5 of 2000) as amended, aligned with the aims of the Broad-Based Black Economic Empowerment Act and its Codes of Good Practice. In accordance with this Act, submissions will be adjudicated in two stages:

a. Firstly, on functionality, wherein bidders will be evaluated for functionality and should attain a minimum threshold of 70 points, as referred to below, in order to advance to the second stage. Bids that fail to meet the minimum threshold as per the bid invitation for functionality will be disqualified.
b. Secondly, only the qualifying bids (those that would have attained the minimum threshold) will be evaluated in terms of the 80/20 preference points system, where the 80 points will be used for price only and the 20 points will be awarded in terms of the Specific Goals as per the CSD Report submitted by service providers.

Criteria for measuring Functionality	Weight
Capability The service provider should demonstrate a technical approach, methodology, a Detailed Work Plan, knowledge, and understanding of the Public Service Regulatory Framework for Probity Audit and Review. •Methodology also indicates responsibilities of key project resources and ensuring services are available on commencement of the project. • Methodology with activities, timelines and deliverables linked to the activities. (20) • Methodology with activities and timelines or deliverables. (15) • Methodology with activities only. (10) • Methodology is irrelevant to the scope of work. (5) • No methodology submitted. (0)	35 Scale (20)
Demonstration of knowledge and understanding of the Public Service Regulatory Framework, such as but not limited to the Public Finance Management Act (PFMA) and its Regulations, Public Services Procurement Policies, South African Constitution, Protection of Personal Information (POPI) Act. • Knowledge of Core Legislative Framework (PFMA & Related Regulations) • Understanding of Public Sector Procurement and Supply Chain Policies	Scale (15)
Capacity	30

NB: Failure to provide a CV and copies of qualifications will lead to the allocation of zero points. The service provider should demonstrate the ability, Details of experience, and capacity of resources to fulfil the services required in terms of the scope of work for SANBI. Probity Project Leader Experience (Minimum qualification and experience of probity audit manager must be CIA or CA(SA) with practical and management experience in the public sector probity auditing field. (Provide 1 CV of a fully qualified probity Project leader with clear probity auditing experience and attach qualifications) Experience in years will be scored as follows: Above 6 years = 10 Between 4 years – 5 years = 8 Between 3 years – 4 years = 6 Between 3 years – 2 years = 4 Between 2 years – 1 year = 2 Below 1 year = 0 • Experience of Probity Auditors (Minimum qualifications for probity auditors must be a bachelor's degree or equivalent qualification (NQF Level 7) in Auditing or Accounting or CIPS Level 6 (MCIPS) with practical experience in auditing or Supply Chain Management field and registration with relevant professional bodies, i.e., IRBA or IIA or SAICA or CIPS or SAIGA. (Provide 2 CVs of fully qualified probity auditors; the experience shall be averaged over 2) • Experience in years will be scored as follows: Above 6 years = 20 Between 4 years – 5 years =16 Between 3 years – 4 years =12 Between 3 years – 2 years =8 Between 2 years – 1 year =4 Below 1 year =0	Scale (10) (20)
Experience	35

This refers to the previous experience of the service provider providing the scope of work detailed in this ToR. The service provider is required to provide the following: List of three (3) current and/or past projects undertaken in the last five (5) years in providing probity review services within the Public Sector. • 3 current and/or past projects =15 • 2 current and/or past projects =10 • 1 current and/or past project =5 • Non submission = 0	Scale (15)
Three (3) written references of traceable current and/or previous Public Sector organizations serviced in providing similar services in the last five (5) years. Reference letters issued by the bidder, its parent company, subsidiary, sister company, affiliate, or any related entity will not be accepted. • 3 written reference letters = 20 • 2 written reference letters = 10 • 1 written reference letters = 5 • Non submission = 0	(20)
TOTAL	100

Functionality scoring values

PHASE 2: SPECIFIC GOALS: Combined goals must be 20 points.
Bids that fail to score 70 points for functionality will not be eligible for further consideration.

The second stage will evaluate the price and Specific goals of those bids that meet the minimum threshold for functionality. By Preferential Procurement Regulations, 2022 about the Preferential Procurement Policy Framework Act (No. 5 of 2000), the 80/20-point system will be applied in evaluating proposals that qualify for further consideration, where price constitutes 80 points and a maximum of 20 points will be awarded based on the bidder's specific goals. The Highest scoring service provider in terms of price and specific goals will be appointed.

Specific Goal	Total Points	Bidders score
Categories of persons historically disadvantaged by unfair discrimination on the basis of race. 100 % black ownership The information will be verified on the CSD report. CSD report must be attached as proof.	(10)	

Categories of persons historically disadvantaged by unfair discrimination based on gender. 100 % female ownership The information will be verified on the CSD report. CSD report must be attached as proof.	(10)	
Total	20	

10. PRICING

Bidders must submit an all-inclusive price and detailed cost breakdown schedule as per Annexure A. The following should be noted:

- The pricing tariffs quoted shall be firm/fixed for the contract period (including any inflation adjustment).
- SANBI will not pay tariffs in excess of the published hourly rates for consultants as prescribed by the South African Institute of Chartered Accountants (SAICA) or in the "Guide on Hourly Fee Rates for Consultants", as prescribed by the Department of Public Service and Administration (DPSA);
- The pricing schedule should be based on an average rate per hour.
- All costs must be shown inclusive of VAT
- Applicable rates for the delivery team must be indicated according to their levels . The team must comprise the following:

Description	Rate Per hour
Project Leader	R
Auditor	R

11. PROJECT MANAGEMENT AND PROJECT MONITORING

The Director of Internal Audit will be the Project Manager for the Institute.

The appointed service provider must submit to the Director of Internal Audit the following:

a. Any possible staff changes during the course of the contract (must be done in consultation with SANBI)

b. Periodic Progress Reports on the service provider's activities; progress of the assignments, as well as on results of completed assignments, in a format and according to timelines that shall be agreed to by both parties and in compliance with Internal Auditing Standards

c. Draft report(s) on each individual assignment completed with clear findings and recommendations to relevant line managers prior to tabling the Director Internal Audit

d. Final report(s) on each individual assignment completed with clear findings and recommendations to the Director of Internal Audit

e. The appointed service provider must guarantee the availability of the relevant staff throughout the duration of the appointment.

12. INDEPENDENCE AND OBJECTIVITY

In carrying out the work, the appointed service provider shall ensure that staff maintain their objective by remaining independent of the activities they assess. The service provider shall

- Have no executive or managerial powers, functions, or duties except those relating to the probity review function.
- Not being involved in the day-to-day operation of SANBI; and
- Not be responsible for the detailed development or implementation of new systems and procedures recommended in their report.

13. INTELLECTUAL PROPERTY AND OWNERSHIP OF MATERIAL

- All intellectual proprietary rights emanating from this project will vest in SANBI and may not be used for any other purpose by the service provider;
- All working paper files shall become the property of SANBI, and must be delivered to SANBI on request;
- Should any action or claim be instituted against SANBI emanating from an infringement of intellectual property or an alleged infringement of intellectual property, the appointed service providers hereby indemnify SANBI against such claims or actions, as well as all costs

14. PREPARATION AND HANDLING OF QUOTATIONS

The South African National Biodiversity Institute will not be held responsible for any expenditure incurred by suppliers or companies in the preparation and handling of the bids and bid documents.

15. SUBMISSIONS

Closing date and time for submissions: **28 September 2026 at 11:00AM**
All documents must be neatly bound, clearly labelled, and include a Table of Contents.
Quotations must be emailed **s.scm-quotations@sanbi.org.za** **and copy to** K.hlatshwayo@sanbi.org.za. Late submissions will not be considered.

Technical enquiries: Ms. Nomzamo Radebe @ **Nom.Radebe @sanbi.org.za**

SANBI
Biodiversity for Life
South African National Biodiversity Institute

ANNEXURE A: REFERENCES

Kindly provide a table of references with the information below:

- Name of company
- Work performed
- Date/s that work was performed
- Contract value
- Contact person, including their email address and telephone number

ANNEXURE B: PRICING

Fixed rate per hour is chargeable for the duration of the contract.

For ease of comparison.

	`Rate per hour
Project Leader	R
Auditor	R
TOTAL AMOUNT INCLUDING VAT	R

Evaluation of price witl be based on Price rate per hour and specific goals