

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (South African National Biodiversity Institute)					
BID NUMBER:	SANBI: F415/2022	CLOSING DATE:	28 February 2022	CLOSING TIME:	11:00
DESCRIPTION	THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE INSURANCE BROKING SERVICES TO THE SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE (SANBI) FOR A PERIOD OF FIVE (5) YEARS				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT:					
Biodiversity Centre Pretoria National Botanical Garden, 2 Cussonia Avenue, Brummeria Pretoria					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON	Mr Alan Smith	
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	sanbi.tenders@sanbi.org.za		E-MAIL ADDRESS	a.smith@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]					

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ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

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

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PART B

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

(Proof of authority must be submitted e.g. company resolution)

DATE:

.....

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**SBD 3.1****PRICING SCHEDULE – FIRM PRICES
(PURCHASES)**

NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED

IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT

Name of bidder.....Bid number: **SANBI:F415/2022**

Closing Time 11:00

Closing date: **28 February 2022**

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO.	QUANTITY	DESCRIPTION	BID PRICE IN RSA CURRENCY
---------------------	-----------------	--------------------	----------------------------------

(ALL APPLICABLE TAXES INCLUDED)

- Required by:

- At:

- Brand and model

- Country of origin

- Does the offer comply with the specification(s)? **YES/NO**

- If not to specification, indicate deviation(s)

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- **Period required for delivery**

***Delivery: Firm/not firm**

- **Delivery basis**

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

**** "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.**

***Delete if not applicable**

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**SBD 4****DECLARATION OF INTEREST**

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representative:
 - 2.2 Identity Number:.....
 - 2.3 Position occupied in the Company (director, trustee, shareholder², member):
 - 2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:
 - 2.5 Tax Reference Number:
 - 2.6 VAT Registration Number:
 - 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹"State" means –

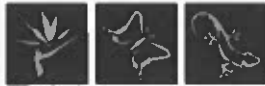
- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or

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(e) Parliament.

"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person connected to the bidder is employed :

Position occupied in the state institution:

Any other particulars:

.....
.....
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

.....
.....
.....

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2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.

.....

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES/NO**

2.10.1 If so, furnish particulars.

.....

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES/NO**

2.11.1 If so, furnish particulars:

.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Income Tax Reference Number	State Number / Employee Persal Number

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4 DECLARATION

I, THE UNDERSIGNED (NAME).....

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

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS
 DECLARATION PROVE TO BE FALSE.

.....
 Signature

.....
 Date

.....
 Position

.....
 Name of bidder

SBD 6.1

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

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

1.2

- a) The value of this bid is estimated to **not exceed** R50 000 000 (all applicable taxes included) and therefore the **80/20** preference point system shall be applicable; or
- b) The 80/20 preference point system will be applicable to this tender.

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution

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are not claimed.

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

2. DEFINITIONS

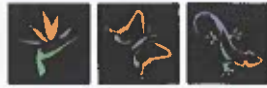
- (a) **"B-BBEE"** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **"B-BBEE status level of contributor"** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **"bid"** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **"Broad-Based Black Economic Empowerment Act"** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **"EME"** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **"functionality"** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **"prices"** includes all applicable taxes less all unconditional discounts;
- (h) **"proof of B-BBEE status level of contributor"** means:

1)	B-BBEE Status level
2)	A sworn affidavit as
3)	Any other requirement
- (i) **"QSE"** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

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

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

80/20

or

90/10

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

or

$$P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

$P_{\min}$ = Price of lowest acceptable bid

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

- 5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 6.1 B-BBEE Status Level of Contributor: . = (maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of

contributor.

7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES	☐	NO	☐
-----	--------------------------	----	--------------------------

7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	☐	NO	☐
-----	--------------------------	----	--------------------------

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at least 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company

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(Pty) Limited
☐ [TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
☐ Supplier
☐ Professional service provider
☐ Other service providers, e.g. transporter, etc.
☐ [TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ

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of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

WITNESSES 1. 2.	 SIGNATURE(S) OF BIDDERS(S) DATE: ADDRESS
--	---

D 8

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's database as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes ☐	No ☐
4.1.1	If so, furnish particulars:		

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4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? As this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445.	Yes ☐	No ☐
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
4.4.1	If so, furnish particulars:		

SBD 8**CERTIFICATION**

I, THE UNDERSIGNED (FULL NAME).....
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

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CERTIFICATE OF INDEPENDENT QUOTATION DETERMINATION

- 1 This Standard Bidding Document (SBD) must form part of all quotations¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.



CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

**THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE INSURANCE BROKING
SERVICES TO THE SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE (SANBI)
FOR A PERIOD OF FIVE (5) YEARS (Bid Number SANBI: F415/2022)**

in response to the invitation for the quote made by:

SOUTH AFRICAN NATIONAL BIODIVERSITY INSTITUTE

do hereby make the following statements that I certify to be true and complete in every
respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

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6. 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 consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
- ³ 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.
9. 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.
10. 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.

SANBI

Biodiversity for Life



South African National Biodiversity Institute

Signature

.....

Position

Date

.....

Name of Bidder

**Stop Fraud, Theft and Corruption without Fear or Favour - Call our Hotline 086 011 1899
Anytime**

REQUEST FOR TENDER

FOR

**THE APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE
INSURANCE BROKING SERVICES TO THE SOUTH AFRICAN NATIONAL
BIODIVERSITY INSTITUTE (SANBI) FOR A PERIOD OF FIVE (5) YEARS**

**The South African National Biodiversity Institute (SANBI)
Private Bag X101
SILVERTON
0184
South Africa**

Tender No.SANBI: F415/2022

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1. INTRODUCTION AND BACKGROUND

The South African National Biodiversity Institute (SANBI) is a schedule 3A public entity organisation 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 requires a service provider to provide insurance broking services for a period of five years.

SANBI has **three (3)** main operational centres, namely at the SANBI Head Office situated in the Pretoria National Botanical Garden (PNBG) in Pretoria, the National Zoological Garden (NZG) in Pretoria and the Kirstenbosch National Botanical Garden (KNBG) in Cape Town. SANBI also has other operational centres within the provinces indicated below:

- **Eastern Cape** (Kwelera National Botanical Garden and the Biodiversity Monitoring Assessment Office in East London)
- **Free State** (Free State National Botanical Garden in Bloemfontein)
- **Gauteng** (Walter Sisulu National Botanical Garden in Roodepoort)
- **KwaZulu-Natal** (KwaZulu-Natal National Botanical Garden in Pietermaritzburg, the KwaZulu-Natal Herbarium and the Biodiversity Monitoring Assessment Office in Durban)
- **Limpopo** (Thohoyandou Botanical Garden in Thohoyandou and the Mokopane Biodiversity Conservation Centre in Mokopane)
- **Mpumalanga** (Lowveld National Botanical Garden in Mbombela)
- **Northern Cape** (Hantam National Botanical Garden in Nieuwoudtville)
- **Western Cape** (Harold Porter National Botanical Garden in Betty's Bay and the Karoo Desert National Botanical Garden in Worcester)

2. INVITATION TO TENDER

Tenders are hereby invited to provide SANBI with insurance broking services for a period of five (5) years. Bidders are required to demonstrate similar work performed within the public sector and with clients of similar size.

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

Deputy Director: Supply Chain Management
The South African National Biodiversity Institute (SANBI)
Private Bag X101
Silverton
0184

The tender closes on 28 February 2022

3. COMPULSORY ONLINE BRIEFING SESSION

SANBI is committed to the health and safety of all bidders and staff members and reducing the spread of COVID-19. As a result, with guidance from regulations published by the National Department of Health, no compulsory on-site briefing session will be held for this tender.

Bidders may direct technical and bidding procedure enquiries to the email addresses below. All responses will be communicated via this tender's advertisement webpage on the SANBI website at: www.sanbi.org.

- For bidding procedure enquiries: sanbi.tenders@sanbi.org.za
- For technical enquiries: a.smith@sanbi.org.za

SANBI will not respond to any questions or requests for clarification if received after 17 February 2022

All questions submitted by prospective bidders and responses to these questions by SANBI will be forwarded to all bidders who attended the briefing session.

4. SCOPE OF WORK

SANBI requires the following insurance services:

a. Performance specifications

The bidders should be able to provide the following general insurance actions in terms of placement, maintenance and administration of the insurance portfolio:

- Place relevant insurance cover based upon SANBI operations and risks;
- Claim administration and maintenance;
- Day-to-day correspondence and queries;
- Monitor premium payments and refunds in accordance with accounts and statements;
- Negotiate settlement of claims on behalf of SANBI;
- Keep proper record of the claims;
- Keep SANBI up to date with latest amendments to the legislation on insurance in writing and through training where necessary.

b. Technical requirements

i. Assets

- To cover all tangible property of every description belonging to SANBI or in which SANBI has any proprietary or pecuniary interest against loss or damage;
- Electronic and computer equipment: to cover all electronic business equipment including computers, laptops, licensed software, leased printers, etc.;
- Stock: to cover on goods forming part of SANBI's business activity;
- Building cover: SASRIA, property terrorism and sabotage, fire, explosion, earthquake, power surges, alterations and additions etc.;
- Cash: to cover cash losses due to theft, fraud etc.;
- Travel: to cover local and international travel.

ii. Employees and visitors' liability

- Public Liability: to protect SANBI against claims involving illness, injury, death, damages to third party property;
- To protect the claims made against SANBI's Board members and Executive staff members. The policy must cover board members and executive staff members against damages, judgements, settlements and defence costs for which they may be held personally liable.

iii. Business interruption

- Cover for financial loss suffered following interruptions of SANBI's business due to whatever cause.

iv Annual renewals

- Review existing cover, limits and sums insured;
- Review uninsured risks and exposure;
- Perform re-broking and market exercise to obtain renewal terms;
- Convene pre-renewal meeting to discuss renewal terms and possible alternatives;
- Renewal follow-up on alternative quotations;
- Presentation of renewal terms and recommended options;
- Confirmation of placement and 100% cover
- Compile and provide detailed insurance manual as well as full summary on cover, limits, conditions and exclusions;
- Check and provide issued policy as well as legal confirmation of statutory compliance;
- Compilation of claims procedural manual;
- Facilitate ad hoc adjustments and endorsements on sums insured and declarations to insurers/re-insures;
- Claims administration;
- Monitor premium payments and refunds in accordance with accounts and statement.

The scope above covers portfolios identified at this stage and does not necessarily limit the scope to the items mentioned. It is expected that the service provider will advise SANBI of any other relevant cover required in the light of its operations.

5. MANDATORY REQUIREMENTS / DOCUMENTS

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

- Duly completed and signed **SBD forms**.
- Compulsory briefing sessions certificate of attendance.
- A copy of the Company Central Supplier Database (CSD) registration report.
- **Fee/cost structure to be submitted with the "ORIGINAL" tender document only.**
- UIF compliance demonstrated by submission of one of the following:
 - A valid copy of the UIF Letter of Compliance issued by the Department of Employment and Labour, or
 - Labour uFiling Employer Statement of Account indicating UIF payments or accruals not older than 12 months, or
 - SARS eFiling Employer Statement of Account indicating UIF payments or accruals not older than 12 months, or
 - Valid proof of exemption for UIF
- A certified copy of Liability Insurance Cover for the company and the total cover available per

claim to the value of R1 million

- Letter of Good Standing from the office of the Compensation Commissioner as required by the Compensation for Occupational Injuries and Diseases Act (COIDA). The letter should be issued by the Department of Labour
- A copy of the latest Audited Financial Statements together with a letter from the auditors confirming that the bidder is solvent..
- A valid original or certified copy of a B-BBEE Status Level Certificate or sworn affidavit must be submitted. The pre-qualification criteria for preferential procurement: Section 4(1) (a) for this tender will be having a stipulated minimum Broad-based Black Economic Empowerment (B-BBEE) Status Level contributor, level 1.

6. ADDITIONAL INFORMATION REQUIRED

The following information is required to ensure that an evaluation can be conducted:

- Company history and ownership.
- List of major clients with contact persons information and details.
- List of previous similar contracts awarded and supported in the last three (3) years.
- Availability of specialised technical resources necessary to render the services required in terms of the scope of work.
- Overall capacity of the firm.
- Details of experience and capacity of resources to fulfil the requirements of SANBI.
- Organisation's commitment to equity principles including details on the equity break-down in the ownership.

7. PRICING

All proposals are to include VAT and SANBI will assume that all pricing received is VAT inclusive and in South African Rand (ZAR).

- Foreign exchange rates used must be indicated (if applicable).
- Pricing template to be completed (Annexure B) (Please note: this Annexure must only be included in the document marked 'Original' (See section 14)).
- All pricing will be final and binding.
- Failure to comply with the pricing table will lead to immediate disqualification.

8. COMMUNICATION AND STATEMENT OF GOOD FAITH

All information provided by SANBI in this ToR is offered in good faith. Individual items are subject to change at any time. SANBI makes no certification that any item is without error.

Formal communications may include, but are not limited to:

- Recommendations to SANBI in writing, regarding any discrepancies, errors or omissions which may exist within this ToR;
- Recommendations to SANBI in writing, regarding any enhancements which might be in SANBI's best interests;
- Questions and requests for clarification. SANBI will make a good faith effort to provide a written response to each question or request for clarification that requires addenda within five calendar days. All questions and answers will be shared with all bidders registered at the compulsory briefing session.

9. EVALUATION

In accordance with the National Treasury Instruction Note on the Amended Guidelines in Respect of Bids that Include Functionality as a Criterion for Evaluation (issued 3 September 2010), this bid will be evaluated in two stages:

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

No	CRITERIA	Weighting
1.	Capability The service provider should demonstrate the ability to carry out the work required. The proposal should include the following: - How the service provider will assist SANBI in ensuring that insurance cover is adequate and SANBI's requirements are met. (10) - Demonstration of an understanding and knowledge of the insurance cover required based on SANBI operations. (15) - Proposal of suitable insurance packages in the market as per SANBI's operations. (10) - Value added services that will be provided to SANBI. (5)	40
2.	Capacity The service provider should demonstrate the ability to carry out the work required. Adequate resources should be assigned for the timeous completion of the project. - Company Profile. The bidder(s) must include a company profile detailing: Company registration documents (Proof of ownership/shareholding certificate). Also provide an organogram of the team allocated to the project. (5) - List of all available resources to be assigned. The CVs should include details of: - Appropriate previous experience of a minimum of three years. Experience in the Public Sector. (10) - Expertise in the form of qualifications and other relevant specialized expertise. These should include: number of years of experience of individual team members in Customer service and clients that the team members have serviced. (10) - Experience in analysing and providing insurance products applicable to SANBI operations. Appropriate supporting documentation should be included. (10)	35
3.	Past Experience This refers to the previous experience of the service provider to provide services of a similar nature. The service provider is required to provide the following: - Scope of work and scale of current and/or past projects undertaken in providing similar services within the Public Sector. This should clearly demonstrate the bidder's short term and long term insurance broking experience. (15) - Written references of traceable current and/or previous organizations to which similar services have been provided in the last three years. Minimum of five (5) should be provided (10)	25

Total Points	100
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Sufficient information must be provided to allow the Bid Evaluation Committee to score bids against all these criteria.

Bids that fail to score a minimum of 70 out of a possible 100 points for functionality will not be eligible for further consideration.

The second stage will evaluate the price and preferential points of those bids that meet the minimum threshold for functionality. In accordance with 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 B-BBEE Status Level Certificate scores constitutes 20 points.

10. REFERENCES

Kindly provide a table of reference as requested in Annexure A.

11. PERIOD OF CONTRACT

This contract will be for a period of five (5) years renewable annually based on performance and internal needs assessment of SANBI.

12. PREPARATION AND HANDLING OF BIDS

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

13. PRICE TO BE PROVIDED (Only in the envelope marked original)

The pricing is to be provided as per the table in Annexure B.

14. SUBMISSIONS

All tender documents submitted shall remain valid for a period of four (4) calendar months (120 days).

In respect of Bids that include functionality as a criterion for evaluation (Issued 3 September 2010), the two-envelope system will be used for this bid.

Service providers are to submit (1) printed document with pricing included in an envelope, marked 'ORIGINAL', and in a separate envelope provide a copy of the document without pricing as a PDF file on a memory stick.

NB: Financial or pricing details (Annexure B) should ONLY be included in the printed document marked 'ORIGINAL', and not in the PDF file of the document on the memory stick.

NB: Failure to submit one printed document with pricing in one envelope, and a document without pricing on a memory stick will lead to your bid being disqualified.

Closing date and time for submissions: 28 February 2022 at 11:00.

All documents must be neatly bound, clearly labelled and include a Table of Contents

Tenders shall be submitted in the following manner:

Addressed to: The Deputy Director: Supply Chain Management

Drop off in the Tender Box located in the Biodiversity Building at the Pretoria National Botanical Garden, 2 Cussonia Avenue, Brummeria, Pretoria by **11:00 on 28 February 2022** Normal office hours are: 08:00–16:00 .

Bidders must ensure that persons delivering their bids understand where and how delivery is to take place.

NB. E-mailed and faxed submissions will not be accepted. Late submissions will not be considered.

ANNEXURE A: REFERENCES

Kindly provide a table of reference with the information below.

Name of company	Date services performed	Contract value	Contact person	Email address	Contact number

**ANNEXURE B:
PRICING**

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Annual fee						
VAT						
TOTAL						