TERMS OF REFERENCE

APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER TO FACILITATE THE YOUTH SUMMIT AND MINI LAB WORKSHOP ON SOCIO ECONOMIC TRANSFORMATION WITHIN SANPARKS THAT WILL LEAD TO THE DEVELOPMENT OF THE FIVE YEAR IMPLEMENTATION PLAN FOR SET

RFQ Number:

SANParks-00406-11-19
REQUEST FOR QUOTATIONS/ PROPOSALS

You are hereby invited to submit proposal / price quotation for the facilitation of youth summit and Mini Lab workshop that will lead to the development of a five-year Socio Economic Transformation (SET) implementation plan and a youth development strategy. The Service Provider will be required to undertake the following activities:

- To assist SANParks with a stakeholder identification and mapping exercise in order to ensure successful execution of the five-year implementation plan;
- To identify potential regulatory and implementation impediments to the implementation of a 5-year plan;
- To ensure alignment of the Mini lab outcomes with the Biodiversity and Tourism Lab outcomes;
- Informed by the Biodiversity and Tourism Lab’s nodal priority areas, the service provider to assist SANParks with ensuring alignment with its own regions;
- To develop a roadmap for an internal organizational readiness process;
- To assist with the facilitation of the Youth Summit and development of a youth development strategy;
- Mini-lab workshop that will lead to the development of a five-year SET implementation plan; and
- To provide logistical support, facilitation and report writing on the outcome of all engagement activities;
- To unpack, categorise and package the issues and inputs received from all stakeholders during the mini lab and provide a report.
<table>
<thead>
<tr>
<th>Advertisement Date:</th>
<th>24 January 2020</th>
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<tbody>
<tr>
<td>Closing Date:</td>
<td>04 February 2020</td>
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<tr>
<td>Closing Time:</td>
<td>11:00am</td>
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<tr>
<td>Compulsory briefing session</td>
<td>NOT REQUIRED</td>
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<tr>
<td>Bid Document Delivery Email Address:</td>
<td><a href="mailto:SCMQuotations@sanparks.org">SCMQuotations@sanparks.org</a> (Please note that this is the delivery address and no responses will be accounted for or accepted if received outside of this email address)</td>
</tr>
<tr>
<td>For Attention:</td>
<td>Charmaine Muzwayine</td>
</tr>
<tr>
<td>Contact details</td>
<td>012 426 5225</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:charmaine.muzwayine@sanparks.org">charmaine.muzwayine@sanparks.org</a></td>
</tr>
</tbody>
</table>
1. PURPOSE

The purpose of this terms of reference (ToR) is to invite suitably qualified and an experienced service provider to submit a proposal to facilitate the youth summit, a mini lab workshop, and develop a roadmap for SANParks’ own internal implementation process including the required commitments, partnerships and system/process change to provide the requisite impact as well as the development of youth development strategy.

2. BACKGROUND

The South African National Parks (SANParks) is a public entity initially established in terms of the now repealed National Parks Act, 57 of 1976 and continues to exist in terms of the National Environmental Management: Protected Areas Act, 57 of 2003; with the mandate to conserve; protect; control; manage national parks and other defined protected areas and their biological diversity (Biodiversity). SANParks manages a system of 19 functional national parks in seven of the nine provinces of South Africa with a total area of just over 4 million hectares comprising 67% of the protected areas under state management. The SANParks is recognized as a world leader in conservation and protected area management.

SANParks Vision: A world-class system of sustainable national parks reconnecting and inspiring society

SANParks Mission: Develop, protect, expand, manage and promote a system of sustainable national parks that represents biodiversity and heritage assets, through innovation and best practice for the just and equitable benefit of current and future generations.

A climate survey conducted with employees in the 2017/18 financial year, listed transformation as the top of the lowest ranked dimensions. It became clear that in order to improve external transformation there is a need to review the Socio Economic Transformation (SET) strategy, facilitate the youth summit and mini lab workshops, develop an SET five-year implementation plan as well as the youth development strategy.
SANParks has since embarked on a process towards the development of an Integrated Transformation Strategy during the 2017/18 financial year. During the same financial year a framework for the strategy was developed and one of the important pillars was identified as:

- Socio-Economic Development Strategy.

During the 2018-19 financial year various internal interactions took place, including (but not limited to) transformation workshops facilitated by an external service provider; the Organisational Design Review process facilitated by an external service provider and its associated change management process and finally, the interrogation of the Socio-Economic Development Strategy (also approved during 2017-18) towards an Implementation Plan and Programmes. During these processes, it became clear that there is substantial overlap and interdependencies between these different initiatives; and that it is important that such strategy be enhanced in collaboration with relevant stakeholders including the shareholder on the one hand and communities, NGOs and the private sector on the other. During the 2018-19 financial year a situational analysis of the state of transformation within SANParks was developed.

From the analysis process, it became clear that SANParks has a desire to transform the organisation on multiple fronts, including inter alia employee demographics, visitor demographic, community and stakeholder engagement, land and brand. With the exception to the land transformation, very few tangible deliverables have been realised to date. The analysis identified the following “as is” realities as challenges towards achieving true and meaningful transformation in SANParks:

- An unidentified culture and distinct objectives related to conservation and tourism mean that the transformation vision does not align to specific business objectives and is not in support of the defined culture;
- Lack of centralised, focussed and specialized transformation unit;
- Lack of a clear operational transformation plan (The current EE Plan does not fulfil this function);
• No clear links between the transformation pillars;

• No operational plan to actively transform the visitor demographic.

**The Situational analysis concluded on the following:**

In May 2016, the Minister of the then Department of Environmental Affairs working in conjunction with the Department of Tourism hosted Lab titled Biodiversity and Tourism Lab. The Lab was a culmination and sign off by the Minister on the work that had previously been done which had among other things-identified areas of focus for the sector, namely, Wildlife, Marine and Coastal Tourism and Bioprospecting as well as identifying initiatives and setting targets for each of the focus areas.

SANParks subsequently developed a 5 – year Socio-Economic Transformation (SET) Strategy whose objectives are to:

• Identify and support implementation of biodiversity economy initiatives that will contribute to the socio-economic development of local communities.

• Facilitate access and participation of communities in tourism opportunities created through the national parks system.

• Establish innovative models for new entrants into the biodiversity economy using SANParks’ assets and resources.

• Foster and support entrepreneurship.

SANParks also hosted a workshop with sector strategic partners in November 2019 where high-level catalytic projects were identified.
3. OBJECTIVES

The Socio-Economic Transformation Strategy was developed internally within divisions and regions, through a series of workshops. These divisions are Conservation Service Development; Tourism and Marketing; Socio-Economic Transformation; Corporate Services; Finance, including Supply Chain Management; Chief Operating Officer, including Strategy and Business Performance; Continuous Improvement; Risk, Ethics and Internal Audit and Parks (regions and 18 National Parks) and the Kruger National Park.

The objectives for the work are the following:

- To concretize and strengthen the identified catalytic projects;
- To ensure alignment of the SANParks SET strategy with the outcomes of the Biodiversity and Tourism Lab;
- To strengthen stakeholder input in the 5-year implementation plan;
- To provide facilitation and report writing on the outcome of the mini Lab; and
- To develop the implementation plan for socio-economic transformation.
- To develop the youth development strategy.

4. SCOPE OF WORK

The request for proposals is to procure the services of a suitably qualified service provider that can conduct, through the facilitation and coordination of strategic partners’ input and participation at a mini-lab, which will be held on the 16 - 18 March 2020. The service provider is specifically expected to:

- To coordinate and facilitate the Mini-Lab with a view to strengthen the November 2019 Summit outcomes;
- To assist SANParks with a stakeholder identification and mapping exercise in order to ensure successful execution of the five-year implementation plan;
- To identify potential regulatory and implementation impediments to the implementation of a 5 year plan;
- To ensure alignment of the Mini lab outcomes with the Biodiversity and Tourism Lab outcomes;
- Informed by the Biodiversity and Tourism Lab’s nodal priority areas, the service provider to assist SANParks with ensuring alignment with its own regions;
- To develop a roadmap for an internal organizational readiness process;
- To assist with the facilitation of the Youth Summit which will be held in preparation of the Mini-lab; and
To provide logistical support, facilitation and report writing on the outcome of all engagement activities;
To unpack, categorise and package the issues and inputs received from all stakeholders during the mini lab and provide a report;

**Bidders are invited to provide SANParks with:**

- A proposal of how the bidder would develop the above elements accompanied by a project plan; and
- The total amount of the bid is R500 000.00 (five hundred thousand rand only)
- A fee arrangement/ cost estimate that the bidder would require to render the services for this project.

### 5. TIMELINES

Time is of the essence in respect of this scope of work and the assistance is required immediately. The successful service provider will be required to commence with work immediately after appointment so that the entire project is completed by March 2020.

### 6. EVALUATION PHASES OF THE RECEIVED PROPOSALS

#### Technical Evaluation

Service Providers are invited to submit the following for technical evaluation:

- A capability statement with demonstrated experience of successful delivery of similar work done.
- The composition of the proposed team with CVs of the team leader and members
- The bidder may sub- contract to deliver on all outcomes expected
- Proposed methodology for conducting such reviews
- Indicative timelines for conducting a review of this nature.
FUNCTIONALITY CRITERIA

SANParks promotes the concept of “best value” in the award of contracts, as opposed to merely looking for the cheapest price, which does not necessarily provide the best value. Best value incorporates the expertise, experience and technical proposal of the organisation and individuals who will be providing the service and the organisational capacity supporting the project team.

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<tr>
<th>EVALUATION CRITERIA</th>
<th>WEIGHT/POINTS</th>
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<tr>
<td>Evaluation</td>
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<td>Methodology (Approach)</td>
<td></td>
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<tr>
<td>Project Plan (Roll out implementation plan)</td>
<td>35</td>
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<tr>
<td>Experience in organisational transformation, facilitations and report writing</td>
<td>20</td>
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<tr>
<td>Human Resource Capability (Project Leader and team Company organogram)</td>
<td>15</td>
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<tr>
<td>TOTAL FUNCTIONAL SCORE</td>
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<tr>
<td>All bidders with a score less than 7- out of the available 100 for functionality will not be considered.</td>
<td>70%</td>
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PHASE 1
STAGE 1: MINIMUM REQUIREMENTS COMPLIANCE RESPONSIVENESS CRITERIA

In this phase All proposals received will be verified for compliance and completeness of the submitted proposal per the set of minimum requirements as listed under paragraph 5.1. Service Providers who comply with the listed requirements progresses to the next phase of bidder(s) functional / technical evaluation requirements.

NB: Only bidders who fully comply with minimum requirements progress to the next phase (2)

PHASE 2: PRICE AND PREFERENCE (B-BBEE)
### 6.1. MINIMUM REQUIREMENTS COMPLIANCE RESPONSIVENESS CRITERIA *(Compliance to legislative and treasury requirements)*

In this phase all responses received will be verified for compliance and completeness of the submitted proposal per the below set of mandatory requirements.

- Submission of Company Profile relevant to the scope of work with details of the firms’ understanding of the requirement of this RFP.
- Submission of fully completed SBD 1 (Invitation to Bid),
- Submission of fully completed Pricing proposal VAT inclusive where applicable
- Submission of fully completed SBD 4 (Declaration of Interest),
- Submission of fully completed SBD 6.1 (Preference Claim Certificate), accompanied by the original or certified B-BBEE Status Level Verification Certificate or original B-BBEE Sworn Affidavit,
- Submission of fully completed SBD8 (Declaration of Bidders Past SCM Practice),
- Submission of fully completed SBD9 (Certificate of Independent Bid Determination),
- Proof of registration with National Treasury Central Supplier Database (CSD).
- Rate per hour for the Team Leader

### 6.2 Project Management Team and Execution

The following are required from the service provider:

- Team Leader’s experience, expertise, competence and more than 10 years in the development of all the elements, which will lead to an SET Implementation plan.
- The team must include workshop facilitators, with a minimum of 5 years relevant experience
- The team must include the services of a socio-economic development specialist with relevant experience
- The team must include the services of an experienced report writer/s
- A project plan indicating key activities, milestones and deliverables.
- CV’s of all the team members
- A detailed Project Plan with clear indication of who will be responsible for the management of the assignment as well as its execution. The allocation of team members to assignments should be based on the qualifications and experience of the proposed project personnel.

6.3 Qualifications and Experience

The following are the minimum qualifications and experience expected of the service provider’s key staff:

- Relevant qualifications and experience in relation to the scope of work.
- Please enclose CV’s that shows experience and qualifications.
- Minimum of 10 years’ experience in conducting similar or equivalent assignment.
- Minimum of 3 references of similar or equivalent experience relating to the scope of work completed in the last five years.

7. EVALUATION FORMULA

The following formula will be applied to calculate the scores:

Price Formula

- The following PPPFA formula will be used to evaluate the price proposals submitted by bidders because price is the only criterion that is scored i.e. the whole 80 points were allocated to price.

\[
PS = 80 \left(1 - \frac{Pt}{P_{\text{min}}}\right)
\]

P_{\text{min}}
• Ps = Points scored for price of the bid under consideration.

• Pt = Rand value of bid under consideration.

• Pmin = Rand value of lowest acceptable bid

8. FINAL AWARD

Service provider who obtains highest total points on PRICE and B-BBEE claimed points shall be awarded the contract. SANParks reserves the right not to appoint.

8.1 Averaged Hourly Rate Calculate

Price Evaluation at estimated hourly rate will be utilized for comparative and evaluation purpose only; as such it should be noted that the total estimated hourly rate does not represent the total contract value, instead the hourly rate will be used to determine the service provider who submitted acceptable rates for recommendation purpose only. The recommended service provider must provide detailed timesheets to support the hours charged to SANParks. All disbursements will be on an actual recovery basis and the recommended service provider will invoice SANParks for those costs. Car travel will be paid per kilometre, not exceeding AA rates and a travel log book must be provided to support all claims.
SANParks promotes the concept of “best value” in the award of contracts, as opposed to merely looking for the cheapest price, which does not necessarily provide the best value. Best value incorporates the expertise, experience and technical proposal of the organisation and individuals who will be providing the service and the organisational capacity supporting the project team. The minimum functional threshold will be 70%. Any bidder who does not meet the minimum threshold will not proceed to the Price and Preference Stage of evaluation.

1 points equivalent of 25
2 points equivalent of 50
3 points equivalent of 75
4 points equivalent of 100

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<th>EVALUATION CRITERIA</th>
<th>WEIGHT</th>
<th>MAXIMUM POINTS</th>
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<tr>
<td>Evaluation</td>
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<tr>
<td>Quality of Methodology (How will you go about identifying relevant staff, facilitate the meetings and getting eventual buy in from all staff).</td>
<td>30</td>
<td>4</td>
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<tr>
<td>Please provide a detailed Methodology</td>
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</table>

1 - The methodology is poorly described and/or does not provide any information regarding the relevant aspects of the project.
2 - The methodology is very briefly described and provides little information regarding the relevant aspects of the project.
3 - The methodology is satisfactorily and meets the requirements and provides information regarding the relevant aspects of the project and has comprehensive information.
4 - The methodology is more than comprehensively described and provides detailed information regarding the relevant aspects of the project and exceeds the expectation.

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<tr>
<td>Execution of the Plan (What, How, When and Why) Please</td>
<td>35</td>
<td>4</td>
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| |                                    | 1 - The Project Plan is poorly described and/or does not provide any information regarding the implementation of the project.
<p>| |                                    | 2 - The Project Plan is very briefly described and provides... |</p>
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<thead>
<tr>
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<tr>
<td>provide a detailed Project Plan</td>
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<td>little information regarding the implementation of the project.</td>
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<td>3 - The Project Plan is satisfactorily described and provides very basic information regarding the implementation of the project, and complies with the minimum comprehensive information.</td>
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<td>4 - The Project Plan is more comprehensively described and provides detailed information regarding the implementation of the project and has less time – lines as required.</td>
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<td>Bidder’s Experience Employment Equity</td>
<td>20</td>
<td>4</td>
<td>1 - 1 - 4 years relevant experience</td>
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<td>(Please provide a detailed Company profile that must include number of years’ relevant experience and a company organogram and References)</td>
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<td>2 - 5 – 9 years’ relevant experience</td>
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<td>3 - 10 years’ relevant experience</td>
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<td>4 – Over 10 years’ relevant experience</td>
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<tr>
<td>Human Resource Capability</td>
<td>15</td>
<td>4</td>
<td>1 - 1 - 4 years relevant experience</td>
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<tr>
<td>(Team Leader)</td>
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<td></td>
<td>2 - 5 – 9 years’ relevant experience</td>
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<tr>
<td>(Please provide detailed CV’s of the project leader and team members who will be involved in this project. The CV’s must indicate the number of years’ relevant experience. Scoring will be based on Team Leader’s)</td>
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<td></td>
<td>3 - 10 years’ relevant experience</td>
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<td>relevant experience.</td>
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<td>TOTAL FUNCTIONAL SCORE</td>
<td>A bidder must score a minimum functional threshold of 75% (75 out of possible 100) to be considered for Price and Preference Points stage of evaluation.</td>
<td>100</td>
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</table>
YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF SOUTH AFRICAN NATIONAL PARKS

BID NUMBER: SANParks-00406-11-19  CLOSING DATE: 04 February 2020  CLOSING TIME: 11h00

DESCRIPTION
APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER TO FACILITATE THE YOUTH SUMMIT AND MINI LAB WORKSHOP ON SOCIO ECONOMIC TRANSFORMATION WITHIN SANPARKS THAT WILL LEAD TO THE DEVELOPMENT OF THE FIVE YEAR IMPLEMENTATION PLAN FOR SET AND THE YOUTH DEVELOPMENT STRATEGY

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (EMAIL ADDRESS)

SCMQuotations@sanparks.org

BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO  TECHNICAL ENQUIRIES MAY BE DIRECTED TO:

<table>
<thead>
<tr>
<th>CONTACT PERSON</th>
<th>Charmaine Muzwayine</th>
<th>CONTACT PERSON</th>
<th>Hilda Mhimunye</th>
</tr>
</thead>
<tbody>
<tr>
<td>TELEPHONE NUMBER</td>
<td>012 426 5225</td>
<td>TELEPHONE NUMBER</td>
<td>012 426 5173</td>
</tr>
<tr>
<td>E-MAIL ADDRESS</td>
<td><a href="mailto:charmaine.muzwayine@sanparks.org">charmaine.muzwayine@sanparks.org</a></td>
<td>E-MAIL ADDRESS</td>
<td><a href="mailto:hilda.mthimunye@sanparks.org">hilda.mthimunye@sanparks.org</a></td>
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SUPPLIER INFORMATION

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<tr>
<th>NAME OF BIDDER</th>
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<th>STREET ADDRESS</th>
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<th>CODE</th>
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<th>VAT REGISTRATION NUMBER</th>
<th>SUPPLIER COMPLIANCE STATUS</th>
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<th>TAX COMPLIANCE SYSTEM PIN:</th>
<th>OR</th>
<th>CENTRAL SUPPLIER DATABASE No:</th>
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<tr>
<th>B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE</th>
<th>TICK APPLICABLE BOX</th>
<th>B-BBEE STATUS LEVEL SWORN AFFIDAVIT</th>
<th>[TICK APPLICABLE BOX]</th>
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<tr>
<td></td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
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[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]

<table>
<thead>
<tr>
<th>ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?</th>
<th>ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?</th>
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<tr>
<td>□ Yes □ No</td>
<td>□ Yes □ No</td>
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<tr>
<th>[IF YES ENCLOSE PROOF]</th>
<th>[IF YES, ANSWER THE QUESTIONNAIRE BELOW ]</th>
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QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

<table>
<thead>
<tr>
<th>IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?</th>
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<tr>
<td>□ YES □ NO</td>
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<td>Question</td>
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<td>DOES THE ENTITY HAVE A BRANCH IN THE RSA?</td>
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<td>DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?</td>
</tr>
<tr>
<td>DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?</td>
</tr>
<tr>
<td>IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?</td>
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**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 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:** .................................................................
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 a price quotation, advertised competitive bid, limited bid or proposal). 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): …………………………………………

2.4 Company Registration Number: ……………………………………………………………………………………….

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.
"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

(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 YES / NO
the appropriate authority to undertake remunerative work outside employment in the public sector?

2.7.2.1 If yes, did you attached 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:

……………………………………………………………………
……………………………………………………………………
……………………………………………………………………

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?

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?

2.11.1 If so, furnish particulars:

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

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Identity Number</th>
<th>Personal Tax Reference Number</th>
<th>State Employee Number / Persal Number</th>
</tr>
</thead>
</table>
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 IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.
<table>
<thead>
<tr>
<th>Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Name of bidder</td>
</tr>
</tbody>
</table>
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


1. GENERAL CONDITIONS

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

- the 90/10 system for requirements with a Rand value of up to R500 000 (all applicable taxes included); and

1.2

a) The value of this bid is estimated to not exceed R 500 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or

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:

<table>
<thead>
<tr>
<th>POINTS</th>
<th>PRICE</th>
<th>80</th>
</tr>
</thead>
</table>

26
1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

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

2. DEFINITIONS

(a) “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;

(b) “B-BBEE status level of contributor” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;

(c) “bid” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;

(d) “Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);

(e) “EME” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(f) “functionality” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.

(g) “prices” includes all applicable taxes less all unconditional discounts;

(h) “proof of B-BBEE status level of contributor” means:

1) B-BBEE Status level certificate issued by an authorized body or person;
2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;

3) Any other requirement prescribed in terms of the B-BBEE Act;

(i) “QSE” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

(j) “rand value” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

\[
Ps = 80 \left( 1 - \frac{Pt - P_{min}}{P_{min}} \right)
\]

Where

\begin{align*}
Ps & = \text{Points scored for price of bid under consideration} \\
Pt & = \text{Price of bid under consideration} \\
P_{min} & = \text{Price of lowest acceptable bid}
\end{align*}
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:

<table>
<thead>
<tr>
<th>B-BBEE Status Level of Contributor</th>
<th>Number of points (80/20 system)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>20</td>
</tr>
<tr>
<td>2</td>
<td>18</td>
</tr>
<tr>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Non-compliant contributor</td>
<td>0</td>
</tr>
</tbody>
</table>

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:  \[ \ldots \ldots \] \( (\text{maximum of 10 or 20 points}) \)

(Points claimed in respect of Paragraph 6.1 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)*

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>

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)*

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>
v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

<table>
<thead>
<tr>
<th>Designated Group: An EME or QSE which is at last 51% owned by:</th>
<th>EME</th>
<th>QSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Black people</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Black people who are youth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are women</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people with disabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people living in rural or underdeveloped areas or townships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cooperative owned by black people</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Black people who are military veterans</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OR

<table>
<thead>
<tr>
<th></th>
<th>EME</th>
<th>QSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any EME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Any QSE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of Company/Firm: ..............................................................................................................
8.2 VAT Registration
Number:……………………………………………………………………………………………

8.3 Company Registration
Number:……………………………………………………………………………………………

8.4 **TYPE OF COMPANY/ FIRM**
- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

8.5 **DESCRIBE PRINCIPAL BUSINESS ACTIVITIES**

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----------------------------------------------------------------------------------

----------------------------------------------------------------------------------

8.6 **COMPANY CLASSIFICATION**
- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.
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 4.1 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

i) The information furnished is true and correct; 

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form; 

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct; 

iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have – 

   (a) disqualify the person from the bidding process; 

   (b) recover costs, losses or damages it has incurred or suffered as a result of that person’s conduct; 

   (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation; 

   (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and 

   (e) forward the matter for criminal prosecution. 

   (f)
## DECLARATION OF BIDDER’S PAST SCM PRACTICES (SBD 8)

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the Bidder or any of its directors listed on the National Treasury’s</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Database of Restricted Suppliers as companies or persons prohibited</td>
<td></td>
<td></td>
</tr>
<tr>
<td>from doing business with the public sector? If Yes, furnish particulars</td>
<td></td>
<td></td>
</tr>
<tr>
<td>as an attached schedule:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is the Bidder or any of its directors listed on the Register for Tender</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Defaulters in terms of Section 29 of the Prevention and Combating of</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corrupt Activities Act (No 12 of 2004)? If Yes, furnish particulars as</td>
<td></td>
<td></td>
</tr>
<tr>
<td>an attached schedule:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Was the Bidder or any of its directors convicted by a court of law</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(including a court outside of the Republic of South Africa) for fraud or</td>
<td></td>
<td></td>
</tr>
<tr>
<td>corruption during the past five years? If Yes, furnish particulars as an</td>
<td></td>
<td></td>
</tr>
<tr>
<td>attached schedule:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Was any contract between the Bidder and any organ of state terminated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>during the past five years on account of failure to perform on or comply</td>
<td></td>
<td></td>
</tr>
<tr>
<td>with the contract? If Yes, furnish particulars as an attached schedule:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Database of Restricted Suppliers and Register for Tender Defaulters resides on the National Treasury’s website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the Home Page.
CERTIFICATE OF INDEPENDENT BID DETERMINATION (SBD 9)

I, the undersigned, in submitting this Bid in response to the invitation for the Bid made by the SANParks, do hereby make the following statements that I certify to be true and complete in every respect:

- I have read and I understand the contents of this Certificate; Yes | No
- I understand that the Bid will be disqualified if this Certificate is found not to be true and complete in every respect; Yes | No
- I am authorised by the Bidder to sign this Certificate, and to submit the Bid, on behalf of the Bidder; Yes | No
- Each person whose signature appears on the Bid has been authorised by the Bidder to determine the terms of, and to sign, the Bid on behalf of the Bidder; Yes | No

For the purposes of this Certificate and the accompanying Bid, I understand that the word “competitor” shall include any individual or organisation, 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

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.
In particular, without limiting the generality of paragraphs 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.

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.

The terms of this 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.

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

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.
The following documents are deemed to form and be read and construed as part of this agreement even where integrated in this document:

<table>
<thead>
<tr>
<th>Document Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitation to Bid (SB1)</td>
</tr>
<tr>
<td>Declaration of Interest (SBD4)</td>
</tr>
<tr>
<td>Preference points claimed (SBD6.1) – Original or certified copy of B-BBEE certificate or Sworn Affidavit</td>
</tr>
<tr>
<td>Declaration of Bidder's past SCM practices (SBD8);</td>
</tr>
<tr>
<td>Certificate of Independent Bid Determination (SBD9)</td>
</tr>
</tbody>
</table>
The obligation to complete, duly sign and submit these declarations included in this SBD declaration pack cannot be transferred to an external authorized representative, auditor or any other third party acting on behalf of the legal entity.

I declare that I have had no participation in any collusive practices with any Bidder or any other person regarding this or any other procurement. I certify that the information furnished in these declarations (SBD4, SBD6.1, SBD8, SBD9) is correct and I accept that SANParks may reject the Offer or act against me should these declarations prove to be false. I confirm that I am duly authorised to sign this SBD declaration pack nominated in writing by the Chief Executive Officer or Senior Member/Person with management responsibility (Close Corporation, Partnership or Individual).

| NAME (PRINT) |  |
| CAPACITY |  |
| SIGNATURE |  |
| NAME OF FIRM |  |
| DATE |  |

**WITNESSES:**

1. 
   
2. 
   
Date

   

