



sanedi

South African National Energy
Development Institute

**REQUEST FOR PROPOSALS
FOR
PILOT ROLL-OUT OF THE SMART GEYSER CONTROL
TECHNOLOGIES (BALANCING ENERGY SUPPLY AND DEMAND
- RESIDENTIAL SECTOR)**

Closing date: **05 March 2025**

Time: **11:00**

Submission format: Electronic submission to 1724.procurement@sanedi.org.za

Name of the respondent:.....

Late bids will not be accepted for consideration.

BID DETAILS

| | |
|-------------------------------------|---|
| Bid Title | Request for proposals for Pilot Roll-Out of the Smart Geyser Control Technologies (Balancing Energy Supply and Demand - Residential Sector) |
| Procurement Reference Number | 1724 |
| Date of TENDER | 12 February 2025 |
| Date of Compulsory Briefing Session | 21 February 2025 at 11:00am |
| Date of Tender CLOSING | 05 March 2025 at 11:00am |

CONTACT INFORMATION

Any enquiries regarding the bidding procedure may be directed to:

SCM Department

Telephone: 011 038 4300

E-mail: enquiries.procurement@sanedi.org.za

BIDDER'S DETAILS

NAME OF BIDDER

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER Code Number

CELL PHONE NUMBER Code Number

FACSIMILE NUMBER Code Number

E-MAIL ADDRESS

Signature of Bidder **Date**

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1. Notice And Invitation to Submit Proposals

The **SOUTH AFRICAN NATIONAL ENERGY DEVELOPMENT INSTITUTE** invites suitably qualified and experienced service providers to submit priced proposals for the supply of goods and services as indicated in the Scope of Works herein.

SANEDI is a research and development entity established as a juristic person in terms of the Energy Act, Act 34 of 2008. SANEDI's key focus areas are research and development into new energy technologies and energy efficiency.

Respondents must comply with the terms and condition as specified in this Bid Document either in their singular capacity or as part of a Joint Venture or consortium.

Potentially emerging enterprises and SMME's who satisfy criteria stated in the Submission Data may submit proposals

Only respondents who submit fully completed priced proposals incorporating all Returnable Schedules duly complete and signed will be eligible to have their submissions evaluated

Queries relating to the issue of these documents may be addressed to

SCM Department

Telephone: 011 038 4300

E-Mail: enquiries.procurement@sanedi.org.za

The closing time for receipt of Proposals is at:

11h00 on Wednesday the 05 March 2025

2. Submission Data – Specific Conditions of Contract.

| | |
|----|---|
| 1. | <p>The Employer</p> <p>The Employer is SANEDI and is referred to as the CLIENT or EMPLOYER.</p> |
| 2. | <p>Composition of Bid Document</p> <p>The Call for Proposals, the price quotation and the Enterprises responding submission documents forms part of a BID DOCUMENT and may be referred to such further herein.</p> <p>The documents associated with the calling for Proposals issued by the employer comprise:</p> <p>Submission Criteria</p> <ul style="list-style-type: none"> • Notice and Invitation to Submit a Quotation • Submission Data – Specific Conditions of Contract • Evaluation Criteria and Scoring • Central Supplier Database (CSD) summary report <p>Returnable Schedules</p> <ul style="list-style-type: none"> • Enterprise Questionnaire • Technical Proposal & Methodology Statements • Specific Goals Declaration • Declaration of Interest • Certificate of Acceptance – General Conditions of Contract • Certificate of Acceptance – Bid Evaluation and Scoring Criteria • Certificate of Understanding – Scope of Works • Certificate of Attendance – Tender Clarification Meeting • Pricing Schedule / Schedule of Rates • Form of Tender • Schedule of Proposed Amendments and Qualifications • Record of Addenda or Errata to the Bid <p><i>NB: BIDDER MUST SUBMIT PROOF OF REGISTRATION WITH THE CONSTRUCTION INDUSTRY DEVELOPMENT BOARD IN AN APPROPRIATE CONTRACTOR GRADING DESIGNATION; (SUBMIT REGISTRATION NUMBER OR PROOF OF REGISTRATION APPLICATION)</i></p> <p>Only respondents who submit fully completed Proposals incorporating all Returnable Schedules duly complete and signed will be eligible to have their submissions evaluated</p> |

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| 3. | <p>Bid Clarification Meeting</p> <p>A compulsory briefing meeting with representatives of the Employer will take place on the 21 February 2025 at 11:00am via Teams.</p> <p>Bidder must Join using the below Link.</p> |
| 4. | <p>ELECTRONIC RETURN OF SUBMISSIONS AND NO MANUAL SUBMISSION WILL BE ACCEPTED.</p> <p>Submissions / Bid Documents may be returned to the CLIENT by means of Electronic Submissions via E-Mail. The Submission E-Mail address designated is 1724.procurement@sanedi.org.za</p> <p>The Bidder shall ensure that the Bid Documents Returnable Schedules together with all Statutory Returns are duly completed, signed and scanned and uploaded to the designated E-mail address in a lock PDF format file.</p> <p>Documents transmitted in an editable format will be regarded as non-returns and may render the submission unresponsive. Telephonic, telegraphic, telex, facsimile submissions offers will not be accepted.</p> <p>The size limits for SANEDI Email is 20 MB. Bidders may submit more than one E-mail.</p> |
| 5. | <p>The closing time for submissions is as stated in the Notice and Invitation to Submit a Proposal Quotation, in the manner specified is</p> <p>Closing date: Wednesday, 05 March 2025 at 11h00</p> <p>NO Late submissions, or submissions not deposited in the designated e-mail address will be considered, and it is incumbent on the Bidder to ensure that their submission together with all supporting documentation is in the designated e-mail address before the closing Time and date specified.</p> |
| 6. | <p>The Bidder holds SANEDI harmless and indemnifies SANEDI in the event of any failure that prevents or delays the bid submission from being in the designated Tender Box/email address at the time of Bid Closure.</p> <p>Bidders are prohibited from using SANEDI Staff acting as their couriers, agents or delivery mediums to deposit bids in the tender box, and the bidder acknowledges that the use of SANEDI staff in this way will immediately disqualify their tender submission.</p> <p>It is the sole responsibility of the bidder to ensure that the documents submitted via PDF format are not corrupt and that any corrupt documents received by the closing date will be automatically excluded from being evaluated.</p> |

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| 7. | <p>Information and data to be completed in all respects</p> <p>Accept that Bid offers, which do not provide all the data or information requested completely and in the form required, may be regarded by the Employer as non-responsive.</p> <p>Accept that the Employer shall not assume any responsibility for the misplacement or Premature opening of the tender offer if the Bid is not submitted in the required format and clearly marked with the bid reference and placed in the designated tender box before bid closing.</p> |
| 8. | SANEDI reserves the right to rotate suppliers according to SANEDI's rotation policy. |
| 9. | SANEDI reserves the right to independently verify Information that is submitted by the bidder. |
| 10. | Bidders are prohibited and will be disqualified if they share resources amongst themselves for the same tender e.g. the proposed team member of company "A" is also a team member of company "B". |

3. Technical Specifications

3.1. BACKGROUND

The challenge facing the South African government is striking a balance between the country's development requirements, energy security, energy access, and greenhouse gas emission reduction. Energy efficiency and clean energy solutions are increasingly prominent in South Africa and around the world, mostly because of the urgent need for South Africa to lessen dependency on fossil fuels, and create a more sustainable future. Different initiatives are taken by government in pursuit of finding integrated energy solutions from the energy supply side through policy and legislation reforms, expanding renewable energy, grid modernisation and intelligence to demand side measures through driving the implementation of energy efficiency. Demand side management (DSM) includes three techniques: energy efficiency, demand response, and energy conservation through changes in behaviour. To reduce consumption of energy and save money, demand side management utilizes all three of these techniques to either shift energy usage patterns or significantly reducing energy usage. Whether implementing small, medium, or large-scale DSM-related projects provide a variety of advantages. These advantages reaped by both the supplier and end-user include a reduction in supply and demand-side costs, a reduction in overall demand, reduces the rate to build new power plants to meet the growing demand, and increase system efficiency.

DSM opportunities varies but with a clear goal to either reduce, shift or optimise energy consumption. SANEDI works with various stakeholders including the industrial, commercial and residential sector to raise energy efficiency awareness, facilitate the adoption of energy saving practices and technologies across the economy. With that said the national grid had previously experienced supply constraints affecting the aforementioned sectors and the economy. Demand side opportunities to either control, curtail and change behaviour are necessary to reduce peak demand and balance energy supply with demand ensuring a more stable grid for the future. Now there are approximately 5.4 million grid-tied electric geysers in the country, which means that the peak power demand from geysers. projected to be more than 3.2 GW [source: <https://www.eng.sun.ac.za/smart-water-heating-could-help-in-south-africas-energy-crisis/>].

Therefore, the ability to control the energy usage patterns of these geysers, especially during peak demand can help the national grid to continue to be stable. Our everyday lives requires hot water which is a basic necessity in a variety of settings more so residential buildings. However, traditional water heating techniques such as geysers can lead to inefficiencies and excessive energy usage. In the country energy efficiency is crucial to minimize greenhouse gas emissions and reduce the strain on the national power grid, therefore geyser control technology helps to regulate the heating and usage patterns, preventing unnecessary energy wastage. Geyser control technology can incorporate water-saving features by allowing users to set specific bathing or showering times ensuring unnecessary water wastage can be avoided.

There is an urgent need to implement a remote geyser management system because geysers contribute about 35% daily peak demand, amounting to about 40% electricity bill in a typical household. This project, which observes a lack of engagement when it comes to an end-user's ability to control and manage their geyser loads, is proposing a smart centralised geyser management system for the residential sector, as opposed to an individually controlled “App” or traditional ripple relay technique. By adopting geyser management system, the residential sector can actively contribute to the country’s demand side management efforts without compromising on the quality or availability of hot water. A remote geyser management system has the potential to minimise energy consumption, enhance user comfort, and contribute to a greener environment. Furthermore, the cumulative impact of widespread adoption of a remote geyser management system could lead to substantial energy savings on a larger scale, contributing significantly to sustainability initiatives.

3.2. PROJECT AIM AND OBJECTIVE

Demand response is a strategy used in electricity grid management to balance supply and demand. Therefore, in relation to geyser control, demand response involves adjusting the operation of geysers in response to changes in electricity demand or grid conditions. It is by implementing demand response mechanisms such as geyser control systems that one can assist in reducing peak power demand, optimise grid stability and improve overall energy efficiency. However, to fully reap the benefits of scheduling geysers, a network of centralised geyser management is essential, that is where a large scale geyser control project come in. According to a study by [3] when controlling geysers there has to be a balance between user comfort, low energy usage and load management.

Now since there are approximately 5.4 million grid-tied electric geysers [1] [2] in the country, which means that the peak power demand from geysers is projected to be more than 3.2 GW. Therefore, the ability to control the energy usage patterns of these geysers, especially during peak demand is essential. Our everyday lives require hot water which is a basic necessity in a variety of settings more so residential buildings. However, traditional water heating techniques such as geysers can lead to inefficiencies and excessive energy usage. In the country energy efficiency is crucial to minimize greenhouse gas emissions and reduce the strain on the national power grid, therefore geyser control technology helps to regulate the heating and usage patterns, preventing unnecessary energy wastage.

- Project Aim: To implement and demonstrate the commercially available smart geyser control technologies for a centralised application for peak/bulk load reduction, load shifting and energy-cost savings.
- Some high level project objectives (per key stakeholders):
 - Customer (end-user): reduce energy consumption and achieve cost savings, and access to hot water without disturbances.

- Eskom Generation: enhance grid stability, achieve peak demand reduction and create demand flexibility to balance energy supply and demand thus contributing to energy security.
 - Eskom Distribution: promote operational effectiveness (lower the cost of bulk electricity, decrease consumption during peak hours, and lessen outages).
 - DMRE/SANEDI: demonstrate the benefits of energy efficiency/demand side management, contributing to energy security through balancing of the grid, increase EEDSM awareness within the residential sector to make it a culture of energy-cost savings. Create direct/indirect job opportunities i.e., ESCos, additional capacity at SANEDI.
 - National Plans: Double energy efficiency implementation by 2030, reduce energy wastage and assist in achieving energy efficiency targets e.g., residential sector (NEES-post 2015).
- Pilot project objectives:
- Assessment of the smart geyser control technologies for a centralised application.
 - Using the smart control technologies to directly control the geyser load, to assess how much of the peak/bulk load from the grid can be reduced, especially during peak period.
 - How much energy-cost savings can be achieved.
- Direct and Indirect project benefits:

Implementing a mass roll-out remote geyser control project can bring various financial and socio-economic benefits to both individuals, society and electrical utilities. However, the specific outcomes may vary depending on the scope, uptake, effectiveness and implementation of the project, some expected benefits include:

- Cost savings for consumers: Geyser control systems, plus blanket insulation allows for optimised heating schedules and temperature settings, reducing energy consumption and resulting in lower electricity bills for consumers. This translates into direct cost savings for households and businesses, especially with a continuous rise in energy charges.
- Economic stimulus: Through reducing energy consumption, geyser control projects can help alleviate strain on the national power grid and reduce the need for expensive infrastructure upgrades or new power plants to accommodate the growing demand. Thus, freeing up financial resources for investment in other areas of the economy, promoting economic growth and stimulating local industries.
- Demand management: A mass roll-out of smart geyser control project will contribute notably to Eskom's current demand side management (DSM) initiatives by shifting energy usage during peak-time to off-peak time and reducing bulk load. Eskom distributors will be able to control a centralised smart geyser load which can contribute to balancing electricity demand throughout the day, prevent overload during peak periods and reduces outages. The success of the project will result in improving grid stability benefiting various sectors.
- Job creation: The implementation of geyser control projects requires skilled labour for installation, maintenance, and monitoring. This creates employment opportunities both directly in the installation, maintenance of geyser control systems and indirectly in the manufacturing and supply chain of related equipment. Therefore, creating jobs contributes to overall socio-economic development, reduces unemployment and improve livelihoods.
- Environmental impact: Geyser control projects decrease energy consumption, resulting in reduced greenhouse gas emissions and this aligns with the country's commitment to environmental sustainability and climate change mitigation. Resulting in a socio-economic

benefit of a healthier and more sustainable environment that positively impacts public health and quality of life.

- Consumer awareness: A geyser control project provides an opportunity to raise awareness among consumers about energy efficiency, load management, and cost-saving practices. Through awareness campaigns during the project timeline, end-users can learn how achieve energy-cost savings, leading to long-term behavioural changes that extend beyond the geyser control project. Thus, empowering communities to make informed energy choices and contribute to sustainable development.

3.3. SCOPE OF WORKS

Demand response is a strategy used in electricity grid management to balance supply and demand. Therefore, in relation to geyser control, demand response involves adjusting the operation of geysers in response to changes in electricity demand or grid conditions. It is by implementing demand response mechanisms such as geyser control systems that one can assist in reducing peak power demand, optimise grid stability and improve overall energy efficiency. However, to fully reap the benefits of scheduling geysers, a network of aggregated geysers is essential, that is where a large-scale geyser control project comes in.

The project explores opportunities to reduce peak demand and shift geyser loads in order to contribute to grid stability, end future occurrences of load shedding, and to compare which technology is best taking results from the smart geyser and “basic” geyser control technologies e.g. ripple control and/or solar geysers.

Proposals are invited from Professional Electrical Engineers/Contractors experienced in electrical design, installations and commissioning with a proven track record, to provide a full electrical engineering services to SANEDI by installing 1000 smart geyser control devices to selected residential areas within the Gauteng Province that can be remotely controlled (within the Eskom distribution control centre).

The scope of work includes but is not limited to the following (one geyser load per household):

3.3.1. Installation of smart geyser control technology:

- Installation and provision of a centralised smart geyser control devices to selected households to shift load and reduce bulk load
 - Utility aimed benefit is load reduction: Which helps save a lot of energy by coordinating a fleet of geysers to use electricity at designated cheaper times.
 - Utility aimed benefit is maximum demand management: By lowering the total maximum demand by harmonising power consumption among a fleet of geysers. Demand costs may be reduced, and a more efficient energy grid made possible.
- Installation and provision of a suitable good quality geyser blanket insulation for indoor and/or outdoor applications (customer benefit).

3.3.2. Turn-key solution from the supplier/contractor:

- Provide and install the smart geyser control devices, set up and install all that is required for a centralised centre, conduct a questionnaire before the implementation and obtain feedback from the households, provide all project management related activities such as supervision, labour, materials, tools, equipment, and construction-services necessary for the installation, operation and maintenance of a centralised smart geyser control project.

3.3.3. Smart Geyser Technology Data Storage & Reporting

- Remotely captured, easy to download and user-friendly data of the smart geyser control technology (back office). Access given to SANEDI/key stakeholder to manage and use data accordingly for reporting and data sharing purposes. Data not to be shared with the public but to remain with SANEDI.

NB: It should be noted that the contractor/supplier has the responsibility of guaranteeing the proper installation of all smart geyser control technologies, maintenance, including the necessary software for data transmission, and that data is delivered to SANEDI/key stakeholder without any errors (fix any bugs).

3.4. High quality guaranteed

To ensure that the project's technological failure rate is minimised, the contractor/supplier shall supply and install high-quality, guaranteed over the life of smart geyser control technologies.

3.5. Utilise operative geysers

A contractor/supplier must utilise the existing mounted operative geysers located in each household to connect the smart geyser control device without retrofitting old geysers or conducting new installation of new geysers. In case of existing geyser blankets the contract/supplier must not replace it with the new one.

3.6. Certification of Compliance

- A certified commissioning company/personnel hired by the contractor/supplier is required to confirm at the end of the project that an electrical installation complies with all relevant regulations (Certificate of Compliances (COCs)).

Other mandatory certifications of compliance for such a project are crucial and the contractor/supplier should adhere.

The anticipated outcomes at the end of the project (12 months after the conclusion of the implementation):

- To demonstrate energy management solutions using smart geyser management technologies
- that can be centralised to create flexibility in response to peak demand (bulk load reduction and load shifting), thus reducing system peak demand.
- To evaluate how much peak demand can be reduced through smart geyser management at a large scale, whilst maintaining end-user comfort.
- To promote demand side management through demand response measures in the residential sector, by conducting strategic marketing/awareness raising e.g. dispelling myths
- that the utility will “randomly” switch off customers causing discomfort.

- Overall increasing the culture of energy consciousness and energy conservation in the residential sector.
- To compare the smart geyser technology by:
 - Assessing the benefits of using the smart geyser control technologies (centralized) versus “Basic” geyser control technologies, e.g. ripple control and/or solar geyser.
 - Assess challenges of using smart geyser control technologies (centralised) vs “Basic” geyser control technologies, e.g. ripple control and/or solar geyser.
 - Assess ease of implementation and cost for smart geyser control technologies (centralised) vs “Basic” geyser control technologies, e.g. ripple control and/or solar geyser.

3.7. OPERATING PRINCIPLE

- 3.7.1 The service providers will have to respond and be elected through SANEDI’s procurement process and evaluation process.
- 3.7.2 The successful service provider would have to submit a proposal through the request for proposals SANEDI SCM processes, must outline a proposed methodology, proposed project plan, timelines, team-responsibilities (organogram), related qualifications (project management, electrical and electronics engineering), and budget breakdown prior to being appointed.
- 3.7.3 The project requires services providers to submit proof of previous work done (reference letters of recommendation) from medium to large scale implementation of geyser control devices for the residential and/or commercial buildings. With impact of energy-cost savings achieved, also it will be advantageous to show projects that have been centralised.
- 3.7.4 A compulsory virtual briefing will take place. Details of this briefing will be shared with interested bidders on receipt of their RSVP to SANEDI Procurement. A follow up second briefing will take place with interested bidders after the first compulsory one for any further clarity before the closing date of the bid.

3.8. DELIVERABLES

- Interactions with targeted stakeholders where necessary
- Minutes of meetings with the Project Advisory Committee
- Online questionnaire and feedback, project implementation, short monthly progress reports
- Final project closure report and handover; M&E of the impact measured (i.e., Energy usage reductions, GHG avoided etc): Report layout
- Executive Summary
- Introduction
- Methodology
- Project Details (all raw data and/or information received/gleaned)
- Findings and/or recommendations for large scale geyser roll-outs
- Conclusion
- Two (2) electronic copies (editable Word version with Excel spreadsheets as applicable and PDF print layout) and a PowerPoint summary presentation of the report.

3.9. GOVERNANCE

Overall project governance will be managed by the SANEDI. The project shall be guided and reviewed by a Project Advisory Committee, composed of members including:

- SANEDI General Manager and Project Managers
- Representatives from the SANEDI identified stakeholder pool
- Other persons may be invited by SANEDI as and when deemed appropriate
- SANEDI shall chair all meetings
- The service provider will be expected to produce minutes and action items from all meetings.
- At least 4 meetings are deemed necessary, but more may be included, an inception meeting, at least two progress meetings and a final closure meeting after completed report submission, attended by the Project Advisory Committee and any other person deemed relevant by SANEDI.

The acceptance of the Final Project Report shall be in accordance with the following procedures:

- Review by SANEDI
- Review by Project Advisory Committee
- External review if deemed appropriate by SANEDI
- Amendments being effected as recommended during the evaluations
- Consideration and recommendation by the Project Advisory Committee taken into account.

3.10. Project duration

The project is estimated to run for a period of 12 months, starting from March 2025 to March 2026. Service providers are recommended to give quotes for installing a turn-key solution for 500 and 1000 smart geyser devices (to controlling one geyser load per household). The appointed service provider (s) will sign a 12 months contract to procure, deliver, install 14temized14ed smart geyser control devices, and also to measure and evaluate the impact after the project is completed. The project plan shall include a table outlining timeframes, enabling deliverables and costs as well as a schedule of each person's time and task allocation. Payments will be made by SANEDI after acceptance by SANEDI of a Progress/Final Report and/or receipt of an 14temized invoice and statement.

4. CIDB compliance requirements

- It is estimated that tenderers must have a CIDB contractor grading designation of 4EB or higher
- Only those tenderers who are registered with the cidb, or are capable of being so prior to the evaluation of submissions, in a contractor grading designation equal to or higher than a contractor grading designation determined in accordance with the sum tendered, or a value determined in accordance with Regulation 25 (1B) or 25(7A) of the Construction Industry Development Regulations, for a 4EB Or higher class of construction work, are eligible to have their tenders evaluated.
- Joint ventures are eligible to submit tenders provided that:
 1. every member of the joint venture is registered with the cidb;

2. the lead partner has a contractor grading designation in the 4EB or higher class of construction work; or not lower than one level below the required grading designation in the class of works construction works under considerations and possess the required recognition status.

3. the combined contractor grading designation calculated in accordance with the Construction Industry Development Regulations is equal to or higher than a contractor grading designation determined in accordance with the sum tendered for a 4B or higher class of construction work or a value determined in accordance with Regulation 25 (1B) or 25(7A) of the Construction Industry Development Regulations.

- CIDB standard conditions of tender (Annex C) applies to this procurement and is attached to this RFB.

5. Technical Evaluation Criteria

Phase 1: Initial Screening Process: At this phase bidder's response are reviewed to check. if bidders have responded according to SANEDI's RFP document.

Phase 2: Mandatory Requirements: It must be noted that bidders who fail to meet any of the *MANDATORY REQUIREMENTS* will be disqualified and not be evaluated further.

Technical evaluation: Bidders will be evaluated according to the below technical evaluation criteria.

Minimum Technical Threshold is **75%**.

It must be noted that if the Bidder does not meet the 75% minimum threshold, the bidder will be disqualified and not be evaluated further.

Table 1: Outline of Evaluation Criteria

| No. | Technical Criteria | Evidence | Score Guidelines | Weighting |
|----------|--|---|------------------|-----------|
| 1 | Company Experience: Submit a company profile demonstrating a list of similar projects completed, highlights budget, quality workmanship, and timelines. | 9 years or more experience with 8 similar projects completed. | 5 | 15% |
| | | 7 years or more experience with 6 similar projects completed. | 4 | |
| | | 5 years or more experience with 4 similar projects completed. | 3 | |
| | | 3 years or more experience with 2 similar projects completed. | 2 | |
| | | 1 year or more experience with 1 similar projects completed. | 1 | |
| | | No relevant experience. | 0 | |
| 2 | Project Team Qualifications: The lead and team must have | Honours or Post-graduate degree Engineering/project | 5 | 10% |

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| | obtained a professional qualification/s in Engineering/project management or related field, reflected in a short CV . Additional accredited certifications will be an added advantage i.e., CEM, CMVP etc. | management Science or related field. Add 1 score for additional accredited certifications. | | |
| | | Undergraduate degree Engineering/project management Science or related field. Add 1 score for additional accredited certifications. | 4 | |
| | | National Diploma or N6 in Engineering/project management Science or related field. Add 1 score for additional accredited certifications. | 3 | |
| | | Matric (Grade 12) or N5. Add 1 score for additional accredited certifications. | 2 | |
| | | Relevant certification and/or N3 qualification | 1 | |
| | | No relevant qualification. | 0 | |
| 3 | Project Lead Experience: The project lead must have demonstratable years of experience in projects related to either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | Project lead with 10 years or more work experience in either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical related installations. | 5 | 15% |
| | | Project lead with 7 years or more work experience in either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | 4 | |
| | | Project lead with 5 years or more work experience in either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | 3 | |
| | | Project lead with 3 years or more work experience in either geyser control management, geyser installation, geyser | 2 | |

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| | | maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | | |
| | | Project lead with 1 year or more work experience in either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | 1 | |
| | | Less than 1 year of relevant experience. | 0 | |
| 4 | Project Team Members Experience: The project lead must have demonstrable years of experience in in either geyser control management, energy efficiency, demand side management, system optimisation, electrical installations. | Project team with 10 years or more work experience in in either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | 5 | 10% |
| | | Project team with 7 years or more work experience in in either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | 4 | |
| | | Project team with 5 years or more work experience in in either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | 3 | |
| | | Project team with 3 years or more work experience in in either geyser control management, geyser installation, geyser maintenance, energy efficiency, | 2 | |

| | | | | |
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| | | demand side management, system optimisation, electrical installations. | | |
| | | Project team with 1 year or more work experience in in either geyser control management, geyser installation, geyser maintenance, energy efficiency, demand side management, system optimisation, electrical installations. | 1 | |
| | | Project team with less than 1 year of relevant experience. | 0 | |
| 5 | Reference Letters: Service provider/s must have done projects in either geyser control management, geyser installation, geyser maintenance, and/or energy efficiency, demand side management, system optimisation, electrical installations which must be demonstrated or supported by five (5) reference letters (in the client's letterhead and duly signed). | 5 or more reference letters | 5 | 10% |
| | | 4 reference letters | 4 | |
| | | 3 reference letters | 3 | |
| | | 2 reference letters | 2 | |
| | | 1 reference letter | 1 | |
| | | 0 or no evidence provided | 0 | |
| 6 | Project Methodology: Detailed methodology of the work to be undertaken (comprehensive project plan with project timelines and milestones) – not merely a repetition of the “Scope of Work” as aforementioned in sections above | Detailed methodology that includes other factors, not directly addressed above, but deemed necessary for the project to be successful. Service provider included appointing temporary work for the unemployed to carry out useful activities (this supports the EPWP's initiative). | 5 | 40% |
| | | A less detailed methodology as per scope of work. Service provider included appointing temporary work for the unemployed to carry out useful activities (this supports the EPWP's initiative). | 3 | |
| | | Basic repetition of the “Scope of Work”. Service provider included | 1 | |

| | | | | |
|----------------------------|--|--|---|-------------|
| | | appointing temporary work for the unemployed to carry out useful activities (this supports the EPWP's initiative). | | |
| | | No methodology provided. | 0 | |
| Total | | | | 100% |
| Technical Threshold | | | | 75% |

6. Returnable Schedules

6.1 Enterprise Questionnaire

Bidders must return submission date for all sections under item 6.1.1 – 6.1.7. On separate sheets where applicable.

Detailed documentation must be attached to this section under sub clauses 6.1.1 – 6.1.7 to provide substantive returns

6.1.1 Company Profile

The following particulars must be furnished. In the case of a joint venture, separate enterprise questionnaires in respect of each partner must be completed and submitted.

Section 1: Name of enterprise:

Section 2: VAT registration number, if any:

Section 3: CIDB registration number, if any:

Section 4: Particulars of sole proprietors and partners in partnerships

| Name* | Identity number* | Personal income tax number* |
|-------|------------------|-----------------------------|
| | | |
| | | |
| | | |

* Complete only if sole proprietor or partnership and attach separate page if more than 3 partners

Section 5: Particulars of companies and close corporations

Company registration number

Close corporation number

Tax reference number

Section 6: Record in the service of the state

Indicate by marking the relevant boxes with a cross, if any sole proprietor, partner in a partnership or director, manager, principal shareholder or stakeholder in a company or close corporation is currently or has been within the last 12 months in the service of any of the following:

- | | |
|--|---|
| <input type="checkbox"/> a member of any municipal council | <input type="checkbox"/> an employee of any provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act 1 of 1999) |
| <input type="checkbox"/> a member of any provincial legislature | |
| <input type="checkbox"/> a member of the National Assembly or the National Council of Province | <input type="checkbox"/> a member of an accounting authority of any national or provincial public entity |
| <input type="checkbox"/> a member of the board of directors of any municipal entity | <input type="checkbox"/> an employee of Parliament or a provincial legislature |
| <input type="checkbox"/> an official of any municipality or municipal entity | |

If any of the above boxes are marked, disclose the following:

| Name of sole proprietor, partner, director, manager, principal shareholder or stakeholder | Name of institution, public office, board or organ of state and position held | Status of service (tick appropriate column) | |
|---|---|--|-----------------------|
| | | Current | Within last 12 months |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

*insert separate page if necessary

Section 7: Record of spouses, children and parents in the service of the state

Indicate by marking the relevant boxes with a cross, if any spouse, child or parent of a sole proprietor, partner in a partnership or director, manager, principal shareholder or stakeholder in a company or close corporation is currently or has been within the last 12 months been in the service of any of the following:

| Name of spouse, child or parent | Name of institution, public office, board or organ of state and position held | Status of service (tick appropriate column) | |
|---------------------------------|---|--|-----------------------|
| | | Current | Within last 12 months |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

*insert separate page if necessary

The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise:

- i) authorizes the Employer to obtain a tax clearance certificate from the South African Revenue Services that my / our tax matters are in order;
- ii) confirms that the neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;
- iii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iv) confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest; and
- iv) confirms that the contents of this questionnaire are within my personal knowledge and are to the best of my belief both true and correct.

6.1.2 Bidders Experience Profile

The experience of the tenderer or joint venture partners in the case of an unincorporated joint venture or consortium as opposed to the key staff members / experts in similar projects or similar areas and conditions in relation to the scope of work over the last five years will be evaluated.

Tenderers should very briefly describe his or her experience in this regard and attach this to this schedule.

The description should be put in tabular form with the following headings:

| Description of work (service) | Value of work (i.e. the service provided) inclusive of VAT (Rand) | Date completed |
|-------------------------------|---|----------------|
| | | |

6.1.3 Key Personnel

The tenderer should propose the structure and composition of their team i.e. the main disciplines involved, the key staff member / expert responsible for each discipline, and the proposed technical and support staff and site staff. The roles and responsibilities of each key staff member / expert should be set out as job descriptions. In the case of an association / joint venture / consortium, it should, indicate how the duties and responsibilities are to be shared.

The experience of assigned staff member in relation to the scope of work will be evaluated from three different points of view:

- 1) General experience (total duration of professional activity), level of education and training and positions held of each discipline specific team leader.
- 2) The education, training, skills and experience of the Assigned Staff in the specific sector, field, subject, etc which is directly linked to the scope of work.
- 3) The key staff members' / experts' knowledge of issues which the tenderer considers pertinent to the project e.g. local conditions, affected communities, legislation, techniques etc.

A CV of the Project Director and Team Leader of not more than 2 pages should be attached to this schedule, together with the Bidders organization and staffing demographics

DECLARATION OF BIDDER – ENTERPRISE QUESTIONNAIRE

The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that the contents of the sections 5.1.1 – 5.1.3 schedule are within my personal knowledge and are to the best of my belief both true and correct.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

6.2 Technical Proposal & Methodology Statement

6.2.1 Solution Statement

The **Solution Statement and Methodology** must respond to the scope of work and outline the proposed technical solution offered. This technical solution statement should articulate what value add the tenderer will provide in achieving the stated objectives for the project and detail the time frames and proposed methodology. Vulture

The layout of the solution statement and Methodology should be such that it mirrors the headings contained in the Scope of Works, Section 6 of this Bid Document.

The tenderer must as such explain his / her understanding of the objectives of the assignment and the Employer's stated and implied requirements, highlight the issues of importance, and explain the technical approach they would adopt to address them. The document should explain the technical attributes and contain specifications of all equipment proposed, to demonstrate the compatibility and capability of the solution. The technical paper should also include a quality plan which outlines processes, procedures for the testing and verification of deliverables, and meet the requirements and indicate how risks will be managed and what contribution can be made regarding value management. The Methodology statement must also include an activity Gantt reflecting a work breakdown structure.

DECLARATION OF BIDDER – TECHNICAL PROPOSAL AND METHODOLOGY STATEMENTS

The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that the contents of the sections 5.2 schedule is within my personal knowledge and is to the best of my belief both true and correct.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

6.3 Bidder's Declaration of Interest

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

- 2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,
employed by the state?

YES/NO

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

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

| | | |
|--|--|--|
| | | |
| | | |

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

2.2.1 If so, furnish particulars:

.....

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?

YES/NO

2.3.1 If so, furnish particulars:

.....

.....

3 DECLARATION

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

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

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

- 3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.2 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.3 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

.....

Signature

Date

6.4 Preference Points

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender: - the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 Preference Points applicable:

a) The applicable preference point system for this tender is the **80/20** preference point system.

1.3 Points for this tender shall be awarded for:

(a) Price; and

(b) Specific Goals.

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

| | POINTS |
|--|---------------|
| Price | 80 |
| Specific Goals | 20 |
| Total points for price and specific goals | 100 |

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 SANEDI reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the SANEDI.

2. DEFINITIONS

- (a) “tender” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “price” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “rand value” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “tender for income-generating contracts” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “the Act” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).
- (f) “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (g) “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;
- (h) “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;
- (i) “Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (j) “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;
- (k) “functionality” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (l) “proof of B-BBEE status level of contributor” means:
 - B-BBEE Status level certificate issued by an authorized body or person;
 - A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - Any other requirement prescribed in terms of the B-BBEE Act;
 - “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;

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS A maximum of 80 or 90 points is allocated for price on the following basis:

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

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

| The specific goals allocated points in terms of this tender | Number of points allocated (80/20 system) | | | Number of points claimed (80/20 system) (To be completed by the tenderer) |
|---|---|---|------------------|--|
| | Total points possible | Indicator | Points allocated | |
| B-BBEE Status level of Contributor | 10 | Level 1 | 10 | |
| | | Level 2 | 9 | |
| | | Level 3 | 8 | |
| | | Level 4 | 5 | |
| | | Level 5 | 4 | |
| | | Level 6 | 3 | |
| | | Level 7 | 2 | |
| | | Level 8 | 1 | |
| | | Non-compliant | 0 | |
| Women | 5 | Women Owned 76% - 100% | 100% | |
| | | Women Owned 51% - 75% | 75% | |
| | | Women Owned 26% - 50% | 50% | |
| | | Women Owned 5% - 25% | 25% | |
| | | Women Owned less than 5% - 0% | 0% | |
| Youth | 2.5 | Youth Owned 76% - 100% | 100% | |
| | | Youth Owned 51% - 75% | 75% | |
| | | Youth Owned 26% - 50% | 50% | |
| | | Youth Owned 5% - 25% | 25% | |
| | | Youth Owned less than 5% - 0% | 0% | |
| Persons with Disability | 2.5 | Person with Disability 76% - 100% | 100% | |
| | | Persons with disability 51% - 75% | 75% | |
| | | Persons with disability 26% - 50% | 50% | |
| | | Persons with disability 5% - 25% | 25% | |
| | | Persons with disability less than 5% - 0% | 0% | |

| | | | |
|---------------------------------|-----------|--|--|
| TOTAL FOR SPECIFIC GOALS | 20 | | |
|---------------------------------|-----------|--|--|

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4 Company registration number:.....

4.5 TYPE OF COMPANY/FIRM

| Type of Firm | Tick the applicable box here |
|---------------------------------------|------------------------------|
| Partnership/Joint Venture/ Consortium | |
| One-person business/sole propriety | |
| Close corporation | |
| Public Company | |
| Personal Liability Company | |
| (Pty) Limited | |
| Non -Profit Company | |
| State Owned Company | |

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;

- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

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

6.5 Certificate of Acceptance – General Conditions of Contract

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

Warrants that I am duly authorised to do so on behalf of the enterprise, and confirm that the terms and conditions of contract are acceptable to the enterprise and that such contract will be acceptable to the enterprise should the contract or part thereof be awarded to the enterprise, and that such contract will be signed by the enterprise within 7 days of a request to sign the contract.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

6.6 Declaration of Acceptance – Bid Evaluation Criteria

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

Warrant that I am duly authorised to represent our company in the submission of this Bid and we acknowledge that we are fully conversant with, and accept the Bid Evaluation, Scoring and Adjudication Criteria as contained in the Special Conditions of the Bid together with the General conditions as contained on the SANEDI web site, and acknowledge that we have read, understand and accept such as the methodology of bid evaluation and adjudication for this bid.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

6.7 Declaration of Understanding – Scope of Works

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

Warrant that I am duly authorised to represent our company in the submission of this Bid and we acknowledge that we are fully conversant with the scope of works and technical specifications and all requirements enabling us to submit a proposal.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

7. Pricing Schedule

Quotation Model

| # | Designation | Hourly Rate (VAT incl.) |
|----|----------------------------|-------------------------|
| 1. | Energy Specialist/Engineer | |
| 2. | Project Manager | |
| 3. | Project Coordinator/Admin | |
| 4. | Artisan electrician | |
| 5. | Artisan plumber | |
| 6. | Handyman Support | |
| 7. | Other (state:_____) | |
| 8. | Other (state:_____) | |
| 9. | Total Bid: | R |

NOTE: All prices must be VAT inclusive and must be quoted in South African Rand (ZAR)

Other associated costs must be included in the hourly rate table.

| | |
|--|--|
| AMOUNT IN WORDS To be carried forward to Section 8 Form of Tender BID 1724 SIGNATURE OF BIDDER | |
|--|--|

I confirm that I am duly authorised to sign and certify that the price indicated on the schedule is our bid price submitted

NAME (PRINT) CAPACITY

SIGNATURE

NAME OF FIRM DATE

8. Form of Tender

| | |
|-----|---|
| 11. | <p><u>Conditions of Acceptance</u></p> <ul style="list-style-type: none"> ▪ The Tenderer is required to complete this FORM of TENDER in every respect, and tenders will not be considered unless this FORM of TENDER is completed in every particular and each page is initialled by the tenderer and fully signed on this page. ▪ This Form of Tender shall be completed by the tenderer in black ink and no corrections, use of correcting fluids or any alterations will be permitted. ▪ The FORM of TENDER and price schedules shall be stated in South African Rand (ZAR) and the price indicated on the schedules shall be binding on the tenderer, and no exception shall be made for omissions, casting errors or errors of whatsoever nature. ▪ Where a tenderer is not returning a price for a line item, or costs associated with that line item are included in another line item, the tenderer shall endorse that line item with the words, “No Cost” or “incorporated in Item (NO.....)” whichever being applicable. |
| 12. | <p><u>Confidentiality</u></p> <p>All information pertaining to the services acquired by SANEDI from the service provider or furnished to the service provider shall be treated as confidential by the service provider and shall not be used or furnished to any other person other than for the purposes of the services without the written Consent of the Accounting Officer unless such information is or later becomes public knowledge, other than by breach of the afore-going.</p> |
| 13. | <p>The service provider shall ensure that all its officers, employees, agents or subcontractors treat all information relating to the services as confidential.</p> |
| 14. | <p>The service provider shall ensure that proper security procedures are implemented and maintained to restrict, as far as possible, access to confidential information. The service provider shall ensure that no confidential information is copied or reproduced without prior written approval by the Accounting Officer.</p> |
| 15. | <p>Failure by the service provider to comply with the provisions of this Clause shall constitute a material breach of the contract and shall constitute a ground for termination of the contract by SANEDI, by giving the service provider thirty days’ notice.</p> |
| 16. | <p><u>Priced Proposal</u></p> <p>The Bid is a <u>FIXED PRICE PROPOSAL</u> and clause 48 shall apply. Clause 49 is not applicable.</p> |
| 17. | <p><u>FIXED PRICE PROPOSAL</u></p> <p>The price quoted in the pricing schedule and returned in the Form of Tender is returned as a <u>FIXED PRICE PROPOSAL</u> valid for a period of contract and is not subject to cost price escalations, foreign currency variation or additionality as agreed in the Conditions of Contract</p> |

| | |
|------------|---|
| 18. | The Bidder is advised that SANEDI will remit the appointed service provider directly and shall be required to comply with all remittance requirements stipulated in the Conditions of Contract specific to this appointment. |
| 19. | The Bidder is advised to plan and provide for all possible risks that may affect the delivery project on time and what mechanisms are in place to manage such risks. |
| 20. | We/I the undersigned, who warrants that they are duly authorised to do so on behalf of the enterprise, confirms that the contents of the conditions of acceptance pertaining to the FORM of TENDER are acceptable, and having fully understood the scope of works and conditions of bidding, herewith warrant that We/I have satisfied ourselves as to the correctness and sufficiency of the rates and prices set out in the Schedule and therefore offer the following PRICE and offer to undertake the works in accordance with the standards and specifications required. |
| 21. | The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that this Form of Tender is submitted in good faith, free of corrections, alterations or encumbrances and such price is binding on the enterprise for a period of 90 days from date of tender close and may be extended by mutual agreement between the parties for a further period of 90 days thereafter. |
| 22. | We/I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk. |
| 23. | We/I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to SANEDI in accordance with the requirements and specifications stipulated in bid number 1724 at the price/s quoted. This offer remains binding and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid. |
| 24. | We/I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents in accordance with the SANEDI STANDARD CONDITIONS OF CONTRACT pertaining to the supply of goods and services. The Bidder is advised to familiarise themselves with the SANEDI STANDARD CONDITIONS OF CONTRACT pertaining to the supply of goods and services which can be viewed on the SANEDI Website at www.SANEDI.ORG.ZA |
| 25. | We/I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfilment of this contract. |
| 26. | We/I declare that we/I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid. |

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

Warrants that I am duly authorised to do so on behalf of the enterprise, and confirm that the Bid submitted has been checked and all prices shown are full and final, and inclusive of all taxes, levies, duties and encumbrances, and shall remain valid for a period of 90 days from date of Quotation Closure as depicted in the Submission Data Section of this Bid Document

Therefore our TOTAL Tender Price in respect of the Goods and Services requested under this Call for Proposals (BID REF 1724) as stated in South African Rand (ZAR) and upon the terms and conditions set out in the Bid Document free of exceptions, amendments or qualifications save those listed in Schedule 9 shall be:

Tender Amount

R

| |
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| |
|--|

Amount in Words

.....

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

9. Addenda

9.1 Proposed Amendments and Qualifications

| | | |
|------------|--|-----------------------|
| 27. | <p>The Tenderer should record any deviations or qualifications they may wish to make to the tender documents in this Returnable Schedule.</p> <p>If the space provided is insufficient, the Tenderer must reflect the headings and emphasis of matter in this schedule and provide detailed amplification of such deviations and qualifications in a separate sheet and incorporate such response in the singular bound bid document submitted at the time of Tender.</p> <p>The Tenderer accepts that the Client will, at its sole discretion determine the validity of such amendments and or qualifications and apportion weighting to such in addition to the BID SCOPE or evaluation criteria in the best interest of the Client.</p> <p>The decision of the Client in this regard is final, and the Client reserves the right to negotiate with a bidder to finalise the implications of such amendments and qualifications</p> <p>Tenderers must not include deviations or qualifications relating to the scope of work in this schedule where they are required to submit an Approach Paper.</p> | |
| | Page | Clause or item |
| | Proposal | |
| | | |

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

9.2 Record of Addenda to Tender Documents

We confirm that the following communications received from the CLIENT before the submission of this tender offer, amending the tender documents, have been taken into account in this tender offer:

| | Date | Title or Details |
|----|------|------------------|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date