

TERMS OF REFERENCE

REQUEST FOR PROPOSALS FOR THE IMPLEMENTATION OF HARD WATER DESIGNED (INDIRECT) DOMESTIC SOLAR WATER HEATING SYSTEMS FOR THE MILITARY IN LIMPOPO

Closing date: **01 March 2022**

Time: 11:00

Submission format: Electronic submission to 153c.procurement@sanedi.org.za

Name of the respondent:.....

Late bids will not be accepted for consideration.

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BID DETAILS

Bid Title	Hard Water Designed (Indirect) Domestic Solar Water Heating systems for the Military in Limpopo
Procurement Reference Number	153c
Description of Goods & Services	Hard Water Designed (Indirect) Domestic Solar Water Heating systems for the Military in Limpopo
Date of TENDER	08 February 2022
Date of Compulsory Briefing Session	15 February 2022 @ 13:30
Date of Tender CLOSING	01 March 2022

CONTACT INFORMATION

Any enquiries regarding the bidding procedure may be directed to:

Ms Vulani Ngoveni

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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Submission Criteria

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' 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

Ms Vulani Ngoveni

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

The closing time for receipt of Proposals is

11h00 on Tuesday the 01 March 2022

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2. Submission Data – Specific Conditions of Contract.

1.	The Employer The Employer is SANEDI and is referred to as the CLIENT or EMPLOYER.
2.	Composition of Bid Document 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. The documents associated with the calling for Proposals issued by the employer comprise: Submission Criteria • Notice and Invitation to Submit a Quotation • Submission Data – Specific Conditions of Contract • Evaluation Criteria and Scoring • Tax Clearance Requirements • Central Supplier Database (CSD) summary report Returnable Schedules • Enterprise Questionnaire • Technical Proposal & Methodology Statements • Tax Clearance Certificate • B-BBEE Declaration • Declaration of Interest • Certificate of Past Procurement Performance • Certificate of Bid Independence • 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 Only respondents who submit fully completed Proposals incorporating all Returnable Schedules duly complete and signed will be eligible to have their submissions evaluated
3.	Bid Clarification Meeting A compulsory briefing meeting with representatives of the Employer will take place on the 15 February 2022 at 13:30pm via Zoom. Bidders must RSVP by the 14 February at 12:00pm and further details of the bid clarification meeting will be sent to them. All RSVP's should be sent to enquiries.procurement@sanedi.org.za. No late RSVP'S will be considered.

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4.	ELECTRONIC RETURN OF SUBMISSIONS AND NO MANUAL SUBMISSION WILL BE ACCEPTED. Submissions / Bid Documents may be returned to the CLIENT by means of Electronic Submissions via E-Mail. The Submission E-Mail address designated is 153c.procurement@sanedi.org.za 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. Documents transmitted in an editable format will be regarded as non-returns and may render the submission unresponsive. The size limits for SANEDI Email is 20 MB. Bidders may submit more than one E-mail.
5.	The closing time for submissions is as stated in the Notice and Invitation to Submit a Proposal Quotation, in the manner specified is Closing date: 01 March 2022 at 11h00
6.	Telephonic, telegraphic, telex, facsimile submissions offers will not be accepted.
7.	NO Late submissions, or submissions not deposited in the designated Tender Box will be considered, and it is incumbent on the Bidder to ensure that their submission together with all supporting documentation is in the designated Tender Box before the closing Time and date specified.
8.	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. 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. 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.
9.	Information and data to be completed in all respects 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. 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.
10.	SANEDI Reserves the RIGHTS to contract with suppliers who are BEE Compliant.
11.	SANEDI reserves the to rotate suppliers
12.	SANEDI reserves the right to independently verify Information that is submitted by the bidder.
13.	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".

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3. Scope of works/Technical specifications

3.1 BACKGROUND

During 2014 and in subsequent years 2015 and 2016 SANEDI, as a government partner, was invited to speak about renewable energy and energy efficiency at the national level at the DOD Annual Environmental Seminar. Through this relationship SANEDI was subsequently invited to speak at a provincial environmental forum, to contribute towards improving energy usage and assist in advising towards compliance with the DODs environmental and energy strategy at military installations/bases in Limpopo region. At this meeting several areas of potential collaboration were identified that assist the DOD in this sector viz. training of members and advice towards renewable energy and energy efficiency measures for implementation.

A number of military installations in Limpopo province suffer from severe water hardness quality (high lime and mineral content in mainly borehole water). Known as “hard water”, this leads to rapid calcification/lime build-up inside electrical geyser hot water tanks especially around the element. When “hard water” results in calcification around the element, due to heating causing a chemical precipitation, it leads to a cumulative effect of insulation as the geyser element heats more in order to overcome the predominantly calcium layer. Over short periods of time (approximately 18 months) this results in the electrical geyser needing to be replaced before completion of its expected life span (approximately 60 months). The guarantee of the electrical geysers (60 months) purchased by the DOD excludes any damage or lifetime impact as a result of water quality. This means that the DOD is receiving only approximately 35% of the value (65% loss of value) of the electrical geysers at military installations/bases where “hard water” is used.

SANEDI and the DoD are focused on the installation, research and demonstration of a particular domestic Solar Water Heater (SWH) technology specifically designed for extreme hard water (high lime content) environments, as is prevalent in the Limpopo region and as such is seeking to procure indirect SWH systems that are designed specifically to tackle hard water.

3.2 Project Objectives

The focus of the project is to install applicable **indirect high-pressure SWH technology** designed to function under extreme hard water quality onto domestic, military housing. The extent of the full site boundary (number of buildings) and the number of units to be installed is as follows: one military base and 50 family homes.

There are various technologies available for domestic water heating, however, in areas where only “hard water” is available, heat causes a calcium build up (known as calcification) much faster, causing damage and reducing the lifespan of hardware especially electrical geysers.

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This results in high costs for fitment and replacement of technology that is not reaching its projected lifetime of service.

SANEDI is seeking a tried and tested **indirect high-pressure SWH technology** that is commercially available and that has specifically been tested and performs well under extreme hard water conditions. The technology is expected to be resistant to calcification and thus offer a longer lifespan (meeting 5 year guarantee) still delivering hot water to domestic residences.

It must also be noted that while the DOD is regularly undertaking installation, maintenance and repair of water heating infrastructure at its installations/bases, this project aims to support and build capacity in this space for the DOD and its Members. This can be achieved by implementing an energy efficient, renewable energy hardware system that supports human capacity development (HCD) during installation and maintenance, as well as contributing towards reduced energy costs and reliable water heating energy security for the DOD.

3.3 Scope of Works

PRODUCT SUPPLY, TRAINING & INSTALLATION

SANEDI is seeking an experienced service provider that can recommend, design and install the appropriate hard water tolerant indirect SWH systems, while delivering training to DOD members, as part of a full-wrap service offering in compliance with the below.

The product proposed in response to this tender will be used in experimental monitoring by SANEDI to determine SWH technology that is fit for purpose, and to feed into policy recommendations, thus able to be recommended for extreme hard water environments. As such the technology should have the following characteristics:

- The domestic SWH system **MUST** be an **indirect high-pressure system**
- Preference will be given to a vessel with an **indirect internal coil heat exchanger**, above a heat jacket
- It is important to note that this military installation has used pre-feed water filters in the past and this has proven to be ineffective and too costly.
- While not prohibiting the use of filters, this would need to be installed in conjunction with an indirect high pressure system meeting the criteria above. It would also need to be fully covered by the maintenance plan over the 5 years.

Minimum requirement for bid to be considered for Product Supply:

- The product must be designed and guaranteed to perform under hard water conditions, this means it must be a robust indirect high-pressure thermosiphon system as described above
- The service provider must provide a preliminary design of the installation including temperature range and operation provided by the unit
- The service provider must supply services under full wrap (full EPC)

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- The service provider must supply a minimum 5-year O&M agreement inclusive of training during O&M
- The technology provider must issue a 5-year (60 month) warrantee on the assembled/combined system equipment/hardware

The deliverables for the project will be the following:

- Basic preliminary design of the indirect high-pressure thermosiphon system to be implemented
- A detailed costing for the system to be extrapolated across 50 households.
- Houses should be considered to have a minimum number of 4 occupants each in a 3-bedroom house
- Water quality/chemistry analyses will be made available at the compulsory bid briefing
- Project programme including project timeline and project handover date (Gantt Chart)
- An O&M manual
- Detailed training plan for SANDF artisan training
- Hands on installation and operation training for a maximum of 10 SANDF artisans
- Ensure the health and safety of all labour employed in accordance with applicable legislation
- Project inception, progress and closeout meetings between the service provider, SANEDI and the SANDF (as per point 8.)

Additional conditions to consider when implementing this project include:

- All contractor labour involved in the project is exclusive to South African Citizens and/or Permanent Residents
- Military Security (MS) compliance must be ensured for all civilian persons involved in the project/s
 - Requirement for the winning bidder company to be security cleared by Defence Intelligence, otherwise contract is void
 - Requirement for the winning bidder company personnel who will be operating on site, to be security cleared by Defence Intelligence, otherwise contract is void
- Contractors must use identifiable uniform when on military installations
- The DOD and SANEDI are indemnified at all times against contractor loss or injury of any kind
- All fittings (such as doors, pipelines, door frames, verandas, steps, fire hydrants, reels and hoses, walkways, paving, windows, window panes, fascia boards, ceilings, awnings, mushroom fans, etc.) and appliances (such as air conditioners, geysers, gas bottle cages, light fittings, etc.) must be accordingly protected and insured against all risks during construction
- All waste as a result of on-site project execution and material storage must be responsibly removed, managed and disposed of in line with regulation by the appointed contractor
- All associated wastes, packaging, solvents and solutions, shall be disposed in accordance with applicable regulations (not in drainage systems/waste water systems or septic tanks).
- Military will make a securable storage facility available to the appointed contractor for storage of on-site equipment etc.

3.4 Project Management

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The project shall be managed through SANEDI by the RECORD Centre Manager acting as the Owners Engineer, and shall include a Project Oversight Committee as follows:

- a) Chaired by RECORD Centre Manager
- b) A technical representative from SANEDI
- c) A representative or more from the contractor
- d) A representative from the SANDF Limpopo Regional Works Unit
- e) A representative from the SANDF target installation
- f) A quorum shall be deemed when one member from each entity is present

Any project related decisions raised by any party associated with the project compliance and physical installation of the system must be addressed through the SANEDI project manager directly as the contracting party.

The Project Oversight Committee shall meet as follows:

- a) On-site inception meeting, to initiate the Project
- b) Thereafter, progress meetings as deemed necessary
- c) A final closure meeting after project completion
- d) Project closeout meeting.

3.5 Project Schedule

The project shall be completed within **12 months** from the last date of signature to the contract. Any deviations from this will need written motivation to SANEDI.

4 Evaluation Criteria

The bids received will be evaluated in three stages. The first stage will be the assessment of statement of local content, the second a technical evaluation, and finally the financial/BEE evaluation. The following are the evaluation criteria that all bids will be assessed against.

LOCAL CONTENT

National Treasury, according to Instruction 3 of 2016/17 (available online and/or on request), requires a minimum local content of 70% calculated as follows:

$$LC = (1 - X/Y) \times 100$$

Where:

X = imported content in Rand

Y = total bid price in Rand excluding VAT

TECHNICAL EVALUATION STAGE 1

The technology must achieve a **minimum of 14 points** on the below table in order to progress to the full technical evaluation scoring that follows below:

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Criteria	Scoring	Score
Technology is an indirect high-pressure thermosiphon system	Yes = 5 No = 0	
Vessel has an indirect internal coil heat exchanger	Yes = 4 No = 2	
Pre-feed filters to be used	Yes with 5-year support = 1 Yes no support = 0	
Operation and Maintenance plan over 5 years	Yes = 5 O&M for 3 years or less = 2 No = 0	
Plan on capacity building for SANDF Members	Yes in detail with timelines = 5 Yes but no detail = 2 No = 0	

TECHNICAL EVALUATION STAGE 2

1.

Technical evaluation will be made based on the below scoresheet:

Criteria	Scoring Guidelines (1-10)	Weighting
Capacity, capability and experience of organisation(s) in SWH technology implementation (in particular in hard water technology/ hardware) Evidence: Description of company profile, company history including years in business, description of project team including roles, list of previous work in SWH project design and installation	0 = 0 years of relevant capacity, capabilities and experience in SWH project design and installation 2 = 1 year of relevant capacity, capabilities and experience in SWH project design and installation 3 = 2 years of relevant capacity, capabilities and experience in SWH project design and installation 4 = 3 years of relevant capacity, capabilities and experience in SWH project design and installation 5 = 4 years of relevant capacity, capabilities and experience in SWH project design and installation 6 = 5 years of relevant capacity, capabilities and experience in SWH project design and installation	15%

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		10 = 6 or more years of relevant capacity, capabilities and experience in SWH project design and installation.	
	Qualification, capability and experience of Project Manager. Evidence: Curriculum vitae of Project Manager.	1 = 3 years or less and does not have demonstrable experience in SWH project design and installation 4 = 5 years of demonstrable experience in SWH project design and installation 8 = 6 years of demonstrable experience in SWH project design and installation 10 = 6 or more years of demonstrable experience in SWH project design and installation	10%
	References Letters. Evidence: Reference letters (in the client's letterhead, with contacts and duly signed) from end users that the bidder has successfully completed SWH project design and installation.	0 = no reference letter provided 3 = 2 reference letters provided 6 = 4 reference letters provided 10 = 6 or more reference letters provided	15%
	Methodology and hardware of the indirect high-pressure SWH system design and installation Evidence: Detailed methodology/design of the work to be undertaken with specific attention to the technology being indirect high-pressure thermosiphon and able to function under extreme hard water conditions	0 = if the technology is not indirect thermosiphon 1 = repetition of the "Scope of Work" with no detail but conforming to technology requirement 5 = detailed methodology, but no specific installation, timeframe and/or training details 10 = detailed methodology that includes technical installation, time frame as well as other factors related to specifically addressing all required project outputs	40%
	Detailed plan on capacity building for SANDF Members to assist in SWH technology installation.	1 = no plan with no indication of skills development and transfer of indirect SWH technology installation	20%

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	Evidence: Outline of potential for skills development and transfer of this specific indirect high-pressure SWH technology installation knowledge/understanding and applicable OHS	knowledge/understanding and applicable OHS 5 = a plan included, but is not explicit about skills development and transfer of indirect SWH technology installation knowledge/understanding and applicable OHS 10 = comprehensive plan indicating the skills development and transfer of indirect SWH technology installation (including theory) knowledge/understanding and applicable OHS									
	Threshold		75								
	Total		100								
2.	The Bid will be evaluated on 80/20 Preferential Point System according to the Preferential Procurement Policy Framework Act,2000 The points scored out of 80 should be calculated according to the following formula: (i) The 80/20 preference point system $Ps = 80 \left(1 - \frac{Hs - Rs}{Rs} \right)$ where Ps = points scored for functionality and price of the bid/proposal under consideration Hs = highest percentage scored by any acceptable bidder for functionality and price Rs = percentage scored for functionality and price by bid/proposal under consideration										
3.	The maximum score for this bid shall be awarded as follows: <table><tr><td>POINTS</td><td>PRICE</td></tr><tr><td>BBBEE Status level of Contribution</td><td>20</td></tr><tr><td>Points for price</td><td>80</td></tr><tr><td>Total points for price and BBBEE do not exceed</td><td>100</td></tr></table>			POINTS	PRICE	BBBEE Status level of Contribution	20	Points for price	80	Total points for price and BBBEE do not exceed	100
POINTS	PRICE										
BBBEE Status level of Contribution	20										
Points for price	80										
Total points for price and BBBEE do not exceed	100										

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5 Tax Clearance Requirements

4.	It is a condition of bid that the taxes of the successful bidder must be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.
5.	In order to meet this requirement bidders are required to complete in full the attached form TCC 001 "Application for a Tax Clearance Certificate" and submit it to any SARS branch office nationally. The Tax Clearance Certificate Requirements are also applicable to foreign bidders / individuals who wish to submit bids.
6.	SARS will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of 1 (one) year from the date of approval.
7.	The original Tax Clearance Certificate must be submitted together with the bid. Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of the bid. Certified copies of the Tax Clearance Certificate will not be acceptable.
8.	In bids where Consortia / Joint Ventures / Sub-contractors are involved, each party must submit a separate Tax Clearance Certificate.
9.	Copies of the TCC 001 "Application for a Tax Clearance Certificate" form are available from any SARS branch office nationally or on the website www.sars.gov.za
10.	Applications for the Tax Clearance Certificates may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website www.sars.gov.za .
11.	FAILURE TO SUBMIT A VALID TAX CLEARANCE CERTIFICATE WILL RENDER THE BID AS UNRESPONSIVE AND DISQUALIFY SUCH BID FROM FURTHER EVALUATION.

6 Returnable Schedules

6.1 Enterprise Questionnaire

Bidders must return submission date for all sections under item 6.1.1 – 6.1.4. On separate sheets where applicable.

Detailed documentation must be attached to this section under sub clauses 6.1.1 – 6.1.4 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:

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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

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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:

- | | |
|--|---|
| ☐ a member of any municipal council | ☐ 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) |
| ☐ a member of any provincial legislature | |
| ☐ a member of the National Assembly or the National Council of Province | ☐ a member of an accounting authority of any national or provincial public entity |
| ☐ a member of the board of directors of any municipal entity | ☐ an employee of Parliament or a provincial legislature |
| ☐ 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

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*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 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

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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

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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

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6.3 Tax Clearance Certificate

The Bidder is to attach a valid original Tax Clearance Certificate here

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6.4 B-BBEE Bid Declaration

BEE Terms and Conditions

If it is detected that false information regarding the B-BBEE status level of contribution, local production content, or any other matter which will affect or has affected the evaluation of the tender, or where the tender has failed to declare any subcontracting arrangements, 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 favorable arrangements due to such cancellation;
- (d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, 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

Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:			
B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED (Points claimed for BBBEE must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).			Points Claimed
SUB-CONTRACTING		YES	NO
Will any portion of the contract be sub-contracted?			
If yes, indicate: what percentage of the contract will be subcontracted?		%	
the name of the sub-contractor?			
the B-BBEE status level of the sub-contractor?			
is the sub-contractor an EME?			

I, the undersigned (full name).....

Certify that the B-BBEE information furnished on this declaration form is true and correct and attach a current broad-based black economic empowerment certificate as verified by an accredited agency.

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i accept that, in addition to cancellation of a contract, action may be taken against me should this declaration prove to be false.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

TERMS OF REFERENCE

6.5 Bidder's Declaration of Interest

	Any legal person, including persons employed by the state, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favoritism, 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.
	In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

	COMPANY & REPRESENTATIVE DETAILS
	Full Name of bidder or his or her representative
	Identity Number
	Position occupied in the Company (director, trustee, shareholder, member):
	Registration number of company, enterprise, close corporation, partnership agreement or trust
	Tax Reference Number
	VAT Registration Number

	DECLARATIONS	YES	NO
	Are you or any person connected with the bidder presently employed by the state?		
	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:		
	If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?		
	If yes, did you attach proof of such authority to the bid document? <u>(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.)</u>		

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	If no, furnish reasons for non-submission of such proof:		
	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?		
	If so, furnish particulars:		
	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?		
	If so, furnish particulars:		
	Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies Wither or not they are bidding for this contract?		
	If so, furnish particulars:		

Full details of directors / trustees / members / shareholders.			
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 the table below.			
Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number / Persal Number

TERMS OF REFERENCE

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“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.

DECLARATION OF INTEREST

I, the undersigned (name).....

Certify that the information furnished in this declaration is correct and I accept that SANEDI may reject the bid or act against me should this declaration prove to be false.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

TERMS OF REFERENCE

6.6 Declaration of Bidder's Past Supply Chain Management Practices

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

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied). The Database of Restricted Suppliers now 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.	Yes ☐	No ☐

TERMS OF REFERENCE

4.1.1	If so, furnish particulars:		
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.	Yes ☐	No ☐
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐

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4.4.1	If so, furnish particulars:
-------	-----------------------------

SBD 8

CERTIFICATION

I, the undersigned (full name).....

Certify that the information furnished on this declaration form is true and correct.

I accept that, in addition to cancellation of a contract, action may be taken against me should this declaration prove to be false.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

TERMS OF REFERENCE

6.7 Certificate of Independent Bid Determination

I, the undersigned, in submitting the accompanying bid for

in response to the invitation for the bid made by SANEDI do hereby make the following statements that I certify to be true and complete in every respect:

I therefore certify, on behalf of

that I have read and I understand the contents of this Certificate;

1. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
2. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
3. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
4. For the purposes of this Certificate and the accompanying bid, I understand that the word “competitor” shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
5. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium will not be construed as collusive bidding.
6. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.

TERMS OF REFERENCE

7. 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.
8. 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.
9. 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.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

6.8 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

TERMS OF REFERENCE

Signature of Authorised Bidder

Date

6.9 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

6.10 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

TERMS OF REFERENCE

7 Pricing Schedule

No:	Description of the activity	Price
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
Total		
Vat @15%		
Total inclusive of VAT		

TERMS OF REFERENCE

AMOUNT IN WORDS To be carried forward to Section 8 Form of Tender BID 153c 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

TERMS OF REFERENCE

8 Form of Tender

12.	<u>Conditions of Acceptance</u> ▪ 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 tendered shall endorse that line item with the words, “No Cost” or “incorporated in Item (NO.....)” whichever being applicable.
13.	<u>Confidentiality</u> 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.
14.	The service provider shall ensure that all its officers, employees, agents or subcontractors treat all information relating to the services as confidential.
15.	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.
16.	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.
17.	<u>Priced Proposal</u>

TERMS OF REFERENCE

18.	FIXED PRICE PROPOSAL The price quoted in the pricing schedule and returned in the Form of Tender is returned as a FIXED PRICE PROPOSAL 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
19.	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.
20.	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.
21.	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.
22.	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.
23.	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.
24.	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 153c 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.
25.	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
26.	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.
27.	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.
28.	This Clause is intentionally left blank

TERMS OF REFERENCE

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 153c) 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

Amount in Words

.....

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

TERMS OF REFERENCE

9 ADDENDA

9.1 Proposed Amendments and Qualifications

29.	The Tenderer should record any deviations or qualifications they may wish to make to the tender documents in this Returnable Schedule. 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. 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. 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 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.					
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Page</th> <th style="width: 25%;">Clause or item</th> <th style="width: 60%;">Proposal</th> </tr> </thead> <tbody> <tr> <td style="height: 150px;"></td> <td></td> <td></td> </tr> </tbody> </table>	Page	Clause or item	Proposal		
Page	Clause or item	Proposal				

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

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11.2 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



senedi

South African National Energy
Development Institute