



**REQUEST FOR PROPOSALS  
FOR  
THE SUPPLY AND DELIVERY OF AN INTEGRATED PROJECT  
CUSTOMIZED DASHBOARD, REPORTING SYSTEM, FIELD  
VERIFICATION & AUDIT PROCESS TOOL FOR THE NATIONAL  
TREASURY SMART METERING PROJECT – RT29-2024 FOR A  
PERIOD OF 36 MONTHS.**

Closing date: **13<sup>th</sup> June 2025**

Time: 11:00 AM

Submission format: Electronic submission to [0125.procurement@senedi.org.za](mailto:0125.procurement@senedi.org.za)

Name of the respondent:.....

Late bids will not be accepted for consideration.

## BID DETAILS

Bid Title	THE SUPPLY AND DELIVERY OF AN INTEGRATED PROJECT CUSTOMIZED DASHBOARD, REPORTING SYSTEM, FIELD VERIFICATION & AUDIT PROCESS TOOL FOR THE NATIONAL TREASURY SMART METERING PROJECT – RT29-2024 FOR A PERIOD OF 36 MONTHS
Procurement Reference Number	<b>0125</b>
Date of TENDER	<b>22 May 2025</b>
Compulsory Briefing Session	<b>N/A</b>
Date of Tender CLOSING	<b>13<sup>th</sup> June 2025 at 11:00 am</b>

## 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](mailto: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' 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](mailto:enquiries.procurement@sanedi.org.za)

The closing time for receipt of Proposals is at:

**11h00 AM on the 13<sup>th</sup> June 2025**

## 2. Submission Data – Specific Conditions of Contract.

1.	<p><b>The Employer</b></p> <p>The Employer is SANEDI and is referred to as the CLIENT or EMPLOYER.</p>
2.	<p><b>Composition of Bid Document</b></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"> <li>• Notice and Invitation to Submit a Quotation</li> <li>• Submission Data – Specific Conditions of Contract</li> <li>• Evaluation Criteria and Scoring</li> <li>• Central Supplier Database (CSD) summary report</li> </ul> <p>Returnable Schedules</p> <ul style="list-style-type: none"> <li>• Technical Proposal &amp; Methodology Statements</li> <li>• Specific Goals Declaration</li> <li>• Declaration of Interest</li> <li>• Certificate of Acceptance – General Conditions of Contract</li> <li>• Pricing Schedule / Schedule of Rates</li> <li>• Form of Tender</li> </ul> <p><b>Only respondents who submit fully completed Proposals incorporating all Returnable Schedules duly complete and signed will be eligible to have their submissions evaluated</b></p>
3.	<p><b>Bid Clarification Meeting</b></p> <p>There will be no Bid clarification meeting.</p>

4.	<p><b>ELECTRONIC RETURN OF SUBMISSIONS AND NO MANUAL SUBMISSION WILL BE ACCEPTED.</b></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 <a href="mailto:0125.procurement@sanedi.org.za">0125.procurement@sanedi.org.za</a></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 <b>20 MB</b>. 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><b>Closing date: 13<sup>th</sup> June 2025 at 11h00</b></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>
7.	<p><b>Information and data to be completed in all respects</b></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.	<p>SANEDI reserves the right to rotate suppliers according to SANEDI's rotation policy.</p>
9.	<p>SANEDI reserves the right to independently verify Information that is submitted by the bidder.</p>
10.	<p>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".</p>

### **3. Scope Of Works/Technical Specifications**

#### **3.1 BACKGROUND**

The National Treasury Smart Meter Grant (SMG) Project is a strategic initiative aimed at modernizing electricity management across South African municipalities through the large-scale rollout of smart electricity meters. This project seeks to enhance energy efficiency, improve billing accuracy, and enable real-time monitoring of electricity usage for both municipalities and consumers. A key component of the initiative is the development of an integrated API platform designed to consolidate and standardize reporting from multiple service providers and municipalities. By enabling seamless data integration and centralized access to critical insights, the project will support more informed decision-making, operational transparency, and improved service delivery within the national energy sector.

The National Treasury has appointed SANEDI as the implementing agent for its Smart Electricity Meter rollout project for a period of three (3) years. SANEDI is a statutory body established in terms of the National Energy Act No. 34 of 2008. The Act provides for SANEDI to direct, monitor and conduct energy research and development, promote energy research and technology innovation as well as undertake measures to promote energy efficiency throughout the economy.

The purpose of this document is to outline the technical requirements for developing a dashboard that integrates data from various sources to provide a comprehensive view of electricity and water smart metering consumption, municipal financial accounting, and Eskom supplier billing. This dashboard will serve as a critical tool for monitoring, analysing and managing energy and water consumption, with seamless integration into the financial operations.

#### **3.2 Project Aim and Objectives**

The primary objective of this project is to develop a robust and scalable API Dashboard capable of supporting 250,000 meter points. The dashboard will serve as an integrated reporting platform, consolidating data from various service providers, financial systems, and vending systems into a centralized interface for enhanced visibility and decision-making. Key deliverables include the development of a unified platform, seamless support and integration for each service provider, financial system, and vending system, and effective project management throughout the development phase. The solution will also allow for the creation of additional customized reports, available at an agreed-upon cost per report, ensuring adaptability to evolving reporting needs. Furthermore, the project encompasses the implementation of an annual licensing model, calculated per meter point, to ensure the long-term sustainability and support of the platform.

#### **3.3 Scope of Works**

The scope of work for this project includes the following:

##### **3.3.1 Platform Development and Implementation**

3.3.1.1 The design of the solution will require a high-level integration of all available data into a centralized data warehouse. This is essential for creating a unified host platform capable of advanced reporting and monitoring of RT29 projects.

- 3.3.2 Service providers must be able to demonstrate a seamless transfer of data through API integration from various Service Provider systems, including smart metering, financial systems, field activities, and third-party services.
- 3.3.3 A centralized data warehouse must be included for real-time decision-making for comprehensive data analysis and performance tracking. Smart metering data such as consumption patterns, billing information, and operational events, should be integrated to ensure efficient energy management and customer billing.
- 3.3.4 Integration into different municipal financial systems data is required, so as to provide insights into revenue collection and financial forecasting.
- 3.3.5 Field activity logs and asset management capability must also be demonstrated.
- 3.3.6 The platform must be able to provide high-level reporting through performance dashboards and GIS-enabled mapping, ultimately improving service delivery, operational efficiency, and financial performance across the utility network.

The dashboard should be able to aggregate and display data from at least the following sources:

- **Smart Metering Consumption Data:** Retrieved from the Service Provider Head-End System (HES),
- **Municipal Accounting Data:** Extracted from the Municipality's Financial System for demand-side analysis,
- **Eskom Supplier Billing Data:** Includes bills and payments to analyse supply-side dynamics.

### 3.4 Integration Requirements

The proposed solution should at a minimum contain the following elements:

#### 3.4.1 The Preferred Method of API Integration:

Demonstrate that the system supports API integration in the following areas:

#### 3.4.2 Comprehensive API Documentation:

Detailed documentation that includes information on authentication, available endpoints, data structures, error handling, and rate limits.

#### 3.4.3 Webhook Support (Optional but Preferred):

Some systems may utilize webhooks for asynchronous notifications. These can significantly reduce the need for polling and improve the efficiency of the integration. If the system supports webhooks, outline the steps for setting up webhooks, as well as the corresponding objects that would be sent by the hook.

#### 3.4.4 Required API Endpoints:

Provide a high-level breakdown of the data endpoints needed for the integration. Though not exhaustive, these should include:

- **Account and Unit Changes:** An endpoint to retrieve or post any updates per device, including account or unit number changes.
- **Invoice and Reading Data:** An endpoint to post invoice or meter reading data for specific accounts/meter units.
- **Transaction Data:** An endpoint for submitting transaction data regarding purchase

### 3.5 General

- 3.5.1** This specification is not prescriptive of any one particular technology, architecture or implementation paradigm. The successful bidder shall nevertheless demonstrate to the satisfaction of SANEDI that the underlying software of their solution is fit for purpose: based on robust architecture model and framework using industry standard systems and applications.
- 3.5.2** There must be no need for the installation of any additional software, hardware, or licensing required for front-end end-users
- 3.5.3** Software deployment/ implementation should be entirely cloud based with a Web based front-end and Software-as-a-Service (SAAS) model. All licensing and codes must be under SANEDI's name
- 3.5.4** The Web Application should be guaranteed to work with standard versions of Internet browsers, including:
- Microsoft Edge
  - Google Chrome
  - Mozilla Firefox
- 3.5.5** There must be no need for the installation of any browser extensions or “add-ons” such as Adobe Flash or similar.
- 3.5.6** The database should provide for automatic archiving of raw data more than five years old, and this archived data shall be accessible, if required.
- 3.5.7** The metering data acquired and stored by the successful bidder is the property of SANEDI and the successful bidder shall accept full responsibility for the safekeeping, integrity of this data and the uninterrupted provision of these services.

### **3.6 Regulatory Compliance: Information regarding regulatory standards or guidelines for handling the data transmitted via the API, ensuring compliance with legal and security requirements must also be provided.**

### **3.7 Real-time or Batch Processing Requirements:**

Service Providers must be able to demonstrate real-time integration or batch processing methodologies that will be implemented

### **3.8 Integration Methodology Requirements**

Service Providers should demonstrate the following minimum capabilities:

- Integration into municipal financial systems
- Data flow and integration touchpoints
- Systems connectivity requirements
- Ongoing maintenance and support on an annual basis

### **3.9 Field Verification & Audit Process Tool**

SANEDI requires the development and integration of a Field Verification & Audit Process Tool to standardize pre-installation auditing for municipalities and service providers. This tool will be issued to all service providers and will assist in the pre-installation audit process. The Field Verification & Audit Process Tool integrated with the Smart Metering Dashboard, must:

- Support on-site verification of water and electricity meters in residential, commercial, and industrial properties.



- Enable identification and documentation of meter conditions, including tampering, vandalism, bypassing, and database mismatches.
- Capture GPS coordinates, meter serial numbers, and installation metadata.
- Generate digital audit reports with photographic evidence and exception descriptions.
- Provide a centralized interface for service providers, municipal officials and SANEDI.

The designed and developed Field Verification & Audit Process Tool must meet the following Key Functional requirements:

- Be web-based with mobile compatibility to allow real-time field data collection.
- Incorporate Optical Character Recognition (OCR) functionality for automatic meter number recognition.
- Provide secure cloud storage for municipal meter data.
- Enable photo uploads with metadata linking for audit validation.
- Include automated exception reporting for anomalies such as tampering, bypasses, and data mismatches.
- Allow multi-user access and role-based authentication for municipalities and service providers.

### 3.10 Project Duration

Service Providers must also outline the duration for development and deployment of the proposed solution as part of their project proposal. This should be in the form of a Gantt Chart that outlines key milestones for delivery as well as the proposed timelines. Post commissioning, the service provider will be responsible for management, operation, maintenance and support of the system for a period of 36 months.

### 3.11 Quotation Guide

(A detailed project cost breakdown must be included in the proposal)

#	Designation	Cost per meter point (VAT incl.)	Total costs (VAT incl.)
1.	Hardware		
2.	Software and Platform		
3.	Field Verification & Audit Process Tool		
4.	Project Management		
5.	Support, Operations and Maintenance		
6.	Other services (service provider to provide details)		
7.	<b>Total Bid:</b>		

**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**

### 3.12 Mandatory Requirements

N/A

### 3.13 Evaluation Criteria

The bids received will be evaluated in three (3) stages. The first stage will be the prequalification evaluation, the second technical evaluation and the second the third being financial/specific goal. The following are the evaluation criteria that all bids will be assessed against.

### 3.14 Pre-qualification

#### Ownership and Licensing of Deliverables

The successful bidder shall assign and transfer to SANEDI all rights, title, and interest, including but not limited to intellectual property rights, in and to any and all source code, software, and associated licenses developed or produced during this project. All such source code and licenses shall be registered/ recorded and held in the name of SANEDI.

**Bidders are required to provide written confirmation of their acceptance of this condition as part of their submission. Failure to submit such written confirmation will render the bid non-compliant, and the bidder shall be disqualified from further evaluation.**

Criteria	Scoring Guidelines (0-10)	Weighting
<b>Company experience and Profile</b>		
<b>Company Experience:</b> The company must have at least 5 years' experience in delivering dashboarding and reporting solutions .  <b>NB: Supplier to provide company profile including list of relevant dashboarding Projects.</b>	<ul style="list-style-type: none"> <li>10 years relevant experience =10</li> <li>8 years relevant experience =5</li> <li>5 years or less relevant experience = 1</li> <li>No experience = 0</li> </ul>	<b>15%</b>
<b>Project Team Leader qualifications, experience and professional registration:</b>		
<b>Team Leader Qualifications:</b>  The Team Leader must hold a bachelor's degree in engineering, specifically in one of the following disciplines: <ul style="list-style-type: none"> <li>Information Technology (IT)</li> <li>Electronic Engineering</li> <li>Electrical Engineering</li> </ul>	<ul style="list-style-type: none"> <li>Team leader holds a Bachelor's degree in one of the specified disciplines plus additional postgraduate qualification(s) or recognized project management certifications = 10</li> <li>Team leader holds a bachelor's degree in one of the specified disciplines = 8</li> <li>Team leader does not possess a bachelor's degree</li> </ul>	<b>5%</b>

Criteria	Scoring Guidelines (0-10)	Weighting
<b>Company experience and Profile</b>		
	in the specified Engineering disciplines = 0	
<b>Team Leader Experience</b>  The Project Team leader must have at least 5 years' experience in delivering dashboarding and reporting solutions.  <b>NB: Service provider to provide CV of the Project lead</b>	<ul style="list-style-type: none"> <li>10 years or more relevant experience leading large scale, similar projects = 10</li> <li>6-9 years relevant experience leading large, similar projects = 5</li> <li>5 years or less experience leading large scale, similar projects = 1</li> <li>No experience = 0</li> </ul>	<b>5%</b>
<b>Team Leader professional registration/accreditation</b>  Assessment of the Team Leader's professional registration with Engineering Council of South Africa (ECSA) or an equivalent recognized professional body.	<ul style="list-style-type: none"> <li>Team leader is fully registered as a Professional Engineer (Pr. Eng with ECSA or an equivalent statutory body) = 10</li> <li>Team leader is registered as a Candidate Engineer or equivalent with ECSA (or similar recognized body) = 5</li> <li>Team leader is in the process of registering or holds membership in a related but non-statutory professional body = 0</li> </ul>	<b>5%</b>
<b>Project Teams Experience</b>		
<b>Project Teams collective experience</b>  Evaluation of the proposed team's collective qualifications, relevant technical experience, role allocation, and capacity to deliver on the project scope.	<ul style="list-style-type: none"> <li>Highly experienced team with proven track record in delivering similar projects with more than 10 years collective experience = 10</li> <li>Team is well-structured with members having collective experience in similar projects of 10 years = 7</li> <li>Team has adequate collective experience in projects up to 7 years = 5</li> </ul>	<b>5%</b>

Criteria	Scoring Guidelines (0-10)	Weighting
<b>Company experience and Profile</b>		
	<ul style="list-style-type: none"> <li>Team composition unclear, with limited collective experience less 5 years = 1</li> <li>No experience = 0</li> </ul>	
<b>Active Smart Meter Points Supported on the Platform</b>		
<b>Active Points on Platform:</b> Evaluation of the company's demonstrated capacity, through evidence, of managing active live smart meter points on its platform for water and electricity.  <b>NB: The service provider must submit verifiable evidence demonstrating data from an active, operational platform, including active website link for accessing the active dashboard</b>	<ul style="list-style-type: none"> <li>More than 200,000 smart meter live points, with evidence of scalability and successful deployments in similar environments = 10</li> <li>Up to 100,000 live smart meter points supported on the platform = 5</li> <li>Less than 100,000 live smart meter points supported on platform = 1</li> <li>No live smart meter points supported on the platform = 0</li> </ul>	<b>25%</b>
<b>Proposed Project Methodology</b>		
<b>Project Methodology:</b> Assessment of the service provider's proposed methodology for the design, development, implementation, and support of the integrated dashboard, reporting system, field verification, and audit tool.	<ul style="list-style-type: none"> <li>Detailed, realistic methodology tailored to RT29-2024 scope. Includes best practices, agile or hybrid delivery models, resource plan, quality assurance, risk management, stakeholder engagement, and post-deployment support. Demonstrates clear understanding of SANEDI and National Treasury's operational environment = 10</li> <li>Comprehensive methodology covering all project components:</li> </ul>	<b>10%</b>

Criteria	Scoring Guidelines (0-10)	Weighting
<b>Company experience and Profile</b>		
	<p>dashboards, reporting systems, field verification, audit processes, and integration aspects. Includes phases, timelines, roles, and deliverables = 8</p> <ul style="list-style-type: none"> <li>• Basic methodology provided with partial relevance to the project scope. Limited detail on dashboards = 5</li> <li>• Generic, vague methodology with no clear link to project requirements. Lacks detail on implementation approach = 0</li> </ul>	
<b>Proposed Project Execution Plan</b>		
<p><b>Project execution plan</b></p> <p>Evaluation of the service provider's detailed project execution plan, demonstrating their ability to deliver the full solution within the specified timeline.</p>	<ul style="list-style-type: none"> <li>• Highly detailed execution plan, fully aligned with the project scope. Includes phased activities (design, development, testing, commissioning), clear milestones, critical path, risk mitigation, quality assurance, and evidence of prior successful delivery within similar timelines. Demonstrates dedicated resources and readiness to execute immediately upon appointment = 10</li> <li>• Comprehensive and realistic plan with detailed timelines, milestones, task ownership, resource commitments, and preliminary risk mitigation strategies specific delivery requirement = 7</li> </ul>	<b>10%</b>

Criteria	Scoring Guidelines (0-10)	Weighting
<b>Company experience and Profile</b>		
	<ul style="list-style-type: none"> <li>Basic plan provided with activities and indicative timelines, but limited detail on project phases, resources, or risk mitigation = 5</li> <li>Unclear or generic plan, lacking timelines, milestones, or resource allocation. No evidence of experience delivering within tight timeframes = 0</li> </ul>	
<b>Proposed Project Turnaround Timeframe</b>		
<b>Turnaround times for delivery:</b>  Assessment of the service provider's capacity, resources, and project methodology to complete the development, commissioning, and delivery of the required platform within the stipulated 8-week timeframe.	<ul style="list-style-type: none"> <li>Proven track record (evidence of similar projects delivered within <b>8 weeks</b>), with a detailed, realistic project plan, risk mitigation measures, and availability of dedicated resources = 10</li> <li>Detailed project plan demonstrating ability to deliver within <b>8 weeks</b>, with resource allocation and mitigation strategies = 5</li> <li>Proposed delivery exceeds 12 weeks = 1</li> <li>No clear evidence of rapid deployment capability = 0</li> </ul>	<b>10%</b>
<b>Reference letters of relevant Projects successfully executed</b>		
<b>Reference letters:</b>  Assessment of the service provider's relevant experience through signed reference letters confirming successful delivery of projects involving the development and support of dashboards and software platforms.	<ul style="list-style-type: none"> <li>Provides 10 or more high-quality reference letters from large or public sector clients, with detailed descriptions of project scope, successful</li> </ul>	<b>10%</b>

Criteria	Scoring Guidelines (0-10)	Weighting
<b>Company experience and Profile</b>		
	<p>outcomes, and ongoing support services = 10</p> <ul style="list-style-type: none"> <li>Provides 5-9 signed reference letters from reputable clients confirming successful delivery of dashboard and software platform projects = 5</li> <li>Provides 4 or less reference letters, or references not clearly related to dashboard/software platform projects = 0</li> </ul>	
<b>TOTAL</b>		<b>100%</b>
<b>Minimum Threshold</b>		<b>70%</b>

## 5.2.1 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 interest<sup>1</sup> 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

<sup>1</sup> 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 consortium<sup>2</sup> will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.2 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

---

<sup>2</sup> 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.

### 3. 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
<b>Total points for price and specific goals</b>	<b>100</b>

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%	
<b>TOTAL FOR SPECIFIC GOALS</b>	<b>20</b>			

## 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.

.....	
<b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....
	.....
	.....

## **a. Technical Proposal & Methodology Statement**

### **5.2.2 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 .....

### 5.2.3 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 .....

## b. Pricing Schedule

Activities as per the deliverables of the project		COST
Activity 1		
Activity 2		
Activity 3		
Activity 4		
Activity 5		

Additional costs		
Total costs (EXCL.) VAT		
VAT		
Total Cost (INCL.) VAT		

<b>AMOUNT IN WORDS</b> To be carried forward to Section 8 Form of Tender <b>BID 0125</b>  ..... SIGNATURE OF BIDDER	
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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 .....

### c. Form of Tender

1.	<p><b><u>Conditions of Acceptance</u></b></p> <ul style="list-style-type: none"> <li>▪ 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.</li> <li>▪ 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.</li> <li>▪ 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.</li> <li>▪ 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.</li> </ul>
2.	<p><b><u>Confidentiality</u></b></p> <p>All information pertaining to the services acquired by <b>SANEDI</b> 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>
3.	<p>The service provider shall ensure that all its officers, employees, agents or subcontractors treat all information relating to the services as confidential.</p>
4.	<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>
5.	<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 <b>SANEDI</b>, by giving the service provider thirty days’ notice.</p>
6.	<p><b><u>Priced Proposal</u></b></p> <p>The Bid is a <b><u>FIXED PRICE PROPOSAL</u></b>.</p>
7.	<p><b><u>FIXED PRICE PROPOSAL</u></b></p> <p>The price quoted in the pricing schedule and returned in the Form of Tender is returned as a <b>FIXED PRICE PROPOSAL</b> 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>

<b>8.</b>	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.
<b>9.</b>	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.
<b>10</b>	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.
<b>11</b>	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.
<b>12</b>	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.
<b>13</b>	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 0325 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.
<b>14</b>	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 <a href="http://www.SANEDI.ORG.ZA">www.SANEDI.ORG.ZA</a>
<b>15</b>	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.
<b>16</b>	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 0125) 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 .....