

## TERMS OF REFERENCE

# REQUEST FOR PROPOSALS FOR LIGHT AND HEAVY ELECTRIC VEHICLE RETROFIT

Closing date: **07 March 2023**

Time: **11:00**

Submission format: Electronic submission to [0822.procurement@sanedi.org.za](mailto:0822.procurement@sanedi.org.za)

Name of the respondent:.....

Late bids will not be accepted for consideration.

**TERMS OF REFERENCE****BID DETAILS**

Bid Title	Request for proposals for Light and Heavy Electric Vehicle Retrofit
Procurement Reference Number	<b>0822</b>
Description of Goods & Services	Light and Heavy Electric Vehicle Retrofit
Date of TENDER	<b>14 February 2023</b>
Date of Compulsory Briefing Session	<b>22 February 2023 at 10:00am</b>
Date of Tender CLOSING	<b>07 March 2023 at 11:00am</b>

**CONTACT INFORMATION**

Any enquiries regarding the bidding procedure may be directed to:

Ms Vulani Ngoveni

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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### 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's key focus areas are research and development into new energy technologies and energy efficiency.

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

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

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

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

Ms Nondumiso Buthelezi

Telephone: 011 038 4369

E-Mail: [enquiries.procurement@sanedi.org.za](mailto:enquiries.procurement@sanedi.org.za)

The closing time for receipt of Proposals is at:

**11h00 on Tuesday the 07 March 2023**

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

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

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3.	<p><b>Bid Clarification Meeting</b></p> <p>A compulsory briefing meeting with representatives of the Employer will take place on the <b><u>22 February 2023 at 10:00am</u></b> via Zoom. Bidders must RSVP by the <b><u>21 February 2023 at 12:00pm</u></b> and further details of the bid clarification meeting will be sent to them. All RSVP's should be sent to <a href="mailto:enquiries.procurement@sanedi.org.za">enquiries.procurement@sanedi.org.za</a> .</p> <p>Information required for Briefing Session RSVP;</p> <p><b>Bid Number:</b>  <b>Company Name:</b>  <b>Represented by:</b>  <b>Email address:</b></p> <p style="text-align: center;"><b><i>No late RSVP'S will be considered.</i></b></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.</p> <p>The Submission E-Mail address designated is <a href="mailto:0822.procurement@sanedi.org.za">0822.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.</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: 07 March 2023 at 11h00</b></p> <p>NO Late submissions, or submissions not deposited in the designated e-mail address will be considered, and it is the responsibility of the Bidder to ensure that their submission together with all supporting documentation are in the designated e-mail address <u>before</u> the closing Time and date specified.</p>
6.	<p>The Bidder holds SANEDI harmless and indemnifies SANEDI in the event of any failure that prevents or delays the bid submission from being in the designated Tender Box/email address at the time of Bid Closure.</p> <p>Bidders are prohibited from using SANEDI Staff acting as their couriers, agents or delivery mediums to deposit bids in the tender box, and the bidder acknowledges that the use of SANEDI staff in this way will immediately disqualify their tender submission.</p> <p>It is the sole responsibility of the bidder to ensure that the documents submitted via PDF format are not corrupt and that any corrupt documents received by the closing date will be automatically excluded from being evaluated.</p>

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<b>7.</b>	<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>
<b>8.</b>	SANEDI reserves the to rotate suppliers according to SANEDI's rotation policy.
<b>9.</b>	SANEDI reserves the right to independently verify Information that is submitted by the bidder.
<b>10.</b>	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".

**TERMS OF REFERENCE****3. Scope of works/Technical specifications****3.1 BACKGROUND**

The need in the market for the retrofitting of minibuses and larger buses with Electric Vehicle (EV) capability. This requirement is attested to by interest shown by Minibus Taxis and Bus Service companies. Consequently, the need to commission an EV retrofit pilot demonstration.

The financial costs associated with the import of new electric buses or Minibus Taxis are significantly lowered when retrofitting their current vehicle. Small scale production costs are 20% less, and 40% less, with increased scale in production.

With the number of buses and minibuses travelling on our roads, the market for retrofitting such vehicles run into billions of Rands. Given the skills and resources we have available, we have the capacity and capability to undertake the entire EV retrofitting process locally. Employees in the motor vehicle manufacture sector can acquire new skills and competencies in retrofitting vehicles. Such capability will enable South Africa to become a net exporter of EV retrofitted buses and minibuses.

**3.2 OBJECTIVES**

**The project has the following objectives at hand:**

- The project aims to plan, design, and execute the retrofit of a prototype versions of a bus and a minibus to electrify and decarbonise the transport sector.
- Reduce the amount of Green House Gases (GHGs) which leads to pollution and global climate change, generated from vehicles travelling on our road networks.
- Learn lessons and develop IP from research undertaken during the pilot demonstration of installing electric vehicle kits in buses and minibus taxis.
- Train and develop human resources and equip them with skills and competencies locally to retrofit buses and minibus taxis locally.
- Establish and expand upon local production facilities (scalable) where buses and minibuses can be retrofitted with electric vehicle kits.



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### 3.3 Scope of Work

The scope of work for this Terms of Reference is to Request Proposals from South African Higher Learning Institutions, i.e. Universities and Universities of Technologies; Science Councils in the focal area comprising the retrofit of buses and minibuses. The intention for soliciting proposals for this focal area is to address global warming and climate change, and pollution emitting gases released into the atmosphere by buses and minibus taxis.

The following deliverables among other are envisaged:

- Contract award.
- Inception meeting.
- Retrofit mechanical and electrical component needs assessment.
- Install mechanical and electrical components at Retrofit Facility.
- Strip vehicles in preparation for installation.
- Procure or import components for pilot retrofits (i.e., motor, gears, batteries).
- Install components into vehicles.
- Roadworthy retrofitted vehicles.
- Quality Assurance Inspection and Certification.
- Test vehicles and document technical and research findings.
- Document performance testing on vehicles and public information.
- Return retrofitted vehicles to service.
- Quarterly and Annual Progress Reporting.
- Compile Lessons Learnt Report.
- Compile Final Project Report.

#### 3.3.1 Project Duration

The project duration is expected to be completed over a period of two years commencing in April 2023.

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## 4 Evaluation Criteria

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

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

**Phase 3: Technical evaluation:** Bidders will be evaluated according to the below technical evaluation criteria.

Minimum Technical Threshold is **70%**.

It must be noted that if the Bidder does not meet the **70%** minimum threshold, the bidder will be disqualified and not be evaluated further.

**Phase 4:** Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000), 80/20 preference point system.

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No.	Technical Criteria	Evaluation Criteria	Score Range	Evaluator Score	Weighting Score
1.	<b>Experience of Higher Learning Institution:</b> (University and University of Technology partner) or company. Demonstrated experience in research development and innovation. Experience in piloting similar projects.	• 5 years or more experience.	8-10		30%
		• 2 to 5 years’ experience.	5-7		
		• One year experience.	1-4		
2.	<b>Team Leader Qualifications:</b> professional qualifications and experience of the team leader (Qualifications and CVs).  Engineering (Mechanical; Electrical; Technology).	• PhD/Masters’ degree.	8-10		20%
		• Honours degree.	5-7		
		• Degree.	1-4		
3.	<b>Reference Letters:</b> from different companies (on company letterhead), signed by designated manager, and dated.	• 4 or more reference letters	8-10		20%
		• 2 to 3 reference letters	5-7		
		• 1 reference letter 2	1-4		
4.	<b>Methodology:</b> concise approach to investigate concept of key focal areas. Approach to plan, design, execute and analyse work assignment.	• Comprehensive methodology outlining key focal area(s) and analysis.	8-10		20%
		• Reasonable methodology outlining focal area(s) and analysis.	5-7		
		• Poor methodology failing to outline focal area(s) and analysis.	1-4		
5.	<b>Project Plan</b>	• Comprehensive project plan with deliverables, milestones, and timelines.	8-10		10%
		• Fair project plan with either deliverables, milestones, or timelines.	5-7		
		• Poor project plan with neither activity, milestones, nor timelines.	1-4		
Total				100%	
Technical Threshold				70%	

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### 5 Returnable Schedules

#### 5.1 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

##### 5.1.1 Company Profile

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

**Section 1: Name of enterprise:** .....

**Section 2: VAT registration number, if any:** .....

**Section 3: CIDB registration number, if any:** .....

**Section 4: Particulars of sole proprietors and partners in partnerships**

Name*	Identity number*	Personal income tax number*

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

**Section 5: Particulars of companies and close corporations**

Company registration number .....

Close corporation number .....

Tax reference number .....

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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:

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

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

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

\*insert separate page if necessary

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

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

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

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

### 5.1.2 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

### 5.1.3 Key Personnel

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

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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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### 5.2 Technical Proposal & Methodology Statement

#### 5.2.1 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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### **5.3 Tax Clearance Certificate**

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

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### 5.4 Preference Points Claimed

**BID NO: 0822**

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

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

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

#### **1. GENERAL CONDITIONS**

- 1.1 The following preference point systems are applicable to all bids:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
  - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).
- 1.2 The applicable preference point system for this tender is the **80/20** preference point system.
- 1.3 Points for this bid shall be awarded for:
- (a) Price; and
  - (b) B-BBEE Status Level of Contributor.
- 1.4 The maximum points for this bid are allocated as follows:

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

- 1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.
- 1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

**TERMS OF REFERENCE****2. DEFINITIONS**

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - 1) B-BBEE Status level certificate issued by an authorized body or person;
  - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

**3. POINTS AWARDED FOR PRICE****3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS**

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

**80/20****or****90/10**

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

$P_s$  = Points scored for price of bid under consideration

$P_t$  = Price of bid under consideration

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

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

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

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

### 4.2 BID DECLARATION

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

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

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

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

### 6. SUB-CONTRACTING

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

(**Tick applicable box**)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

- 6.1.1 If yes, indicate:

7. What percentage of the contract will be subcontracted.....%

8. The name of the sub-contractor.....

9. The B-BBEE status level of the sub-contractor.....

10. Whether the sub-contractor is an EME or QSE

(**Tick applicable box**)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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11. Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

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

12. **DECLARATION WITH REGARD TO COMPANY/FIRM**

12.1 Name of company/firm:.....

12.2 VAT registration number:.....

12.3 Company registration number:.....

12.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

12.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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

12.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

## TERMS OF REFERENCE

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

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

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

WITNESSES

1. ....

2. ....

.....

SIGNATURE(S) OF BIDDERS(S)

DATE: .....

## TERMS OF REFERENCE

### 5.5 Bidder's Declaration of Interest

	<p>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</p> <ul style="list-style-type: none"> <li>- the bidder is employed by the state; and/or</li> <li>- 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.</li> </ul>
	<p><b>In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.</b></p>

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? (Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.		
If no, furnish reasons for non-submission of such proof:		

## TERMS OF REFERENCE

	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 With 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

"State" means –



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## TERMS OF REFERENCE

- (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

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 ( <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> ) by clicking on its link at the bottom of the home page.	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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 <input type="checkbox"/>	No <input type="checkbox"/>
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 <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

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### 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

### 5.7 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 .....

### 5.8 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 .....

### 5.9 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 .....

### 5.10 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 .....

# SANEDI PROCUREMENT

## TERMS OF REFERENCE

### 6 Pricing Schedule

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



# SANEDI PROCUREMENT

## TERMS OF REFERENCE

<b>AMOUNT IN WORDS</b> To be carried forward to Section 8 Form of Tender <b>BID 0822</b>  ..... 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

### 7 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>
7.	<p><b>FIXED PRICE PROPOSAL</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>
8.	<p>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.</p>
9.	<p>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.</p>

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## TERMS OF REFERENCE

<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 <b>0822</b> 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.
<b>17.</b>	This Clause is intentionally left blank

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 0822) 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:

# SANEDI PROCURMENT

## TERMS OF REFERENCE

Tender Amount

R

Amount in Words .....

.....

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....

## TERMS OF REFERENCE

### 8 ADDENDA

#### a. Proposed Amendments and Qualifications

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

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....

# SANEDI PROCURMENT

## TERMS OF REFERENCE

### 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 .....

