



**REQUEST FOR PROPOSAL
FOR
APPOINTMENT OF A TRANSACTION ADVISOR
SUPPORT TO PUBLIC SECTOR ENTITIES IN THE
DEVELOPMENT OF LARGE-SCALE ENERGY
EFFICIENCY PROJECTS UNDER A PERFORMANCE
CONTRACTING MODEL WITH ENERGY SERVICE
COMPANIES (ESCOS)**

Closing date: **05 September 2025**

Time: 11:00

Submission format: Electronic submission to 0725.procurement@senedi.org.za

Name of the respondent:.....

Late bids will not be accepted for consideration.

BID DETAILS

Bid Title	Request for proposal for Appointment Of a Transaction Advisor Support to Public Sector Entities in the development of large-scale energy efficiency projects under a performance contracting model with Energy Service Companies (ESCOs)
Procurement Reference Number	0725
Date of TENDER	15 August 2025
Date of Compulsory Briefing Session	22 August 2025 at 11:00am
Date of Tender CLOSING	05 September 2025 at 11:00am

CONTACT INFORMATION

Any enquiries regarding the bidding procedure may be directed to:

SCM Department

Telephone: 011 038 4300

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

BIDDER'S DETAILS

NAME OF BIDDER

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER Code Number

CELL PHONE NUMBER Code Number

FACSIMILE NUMBER Code Number

E-MAIL ADDRESS

Signature of Bidder **Date**

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1. NOTICE AND INVITATION TO SUBMIT PROPOSALS

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

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

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

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

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

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

SCM Department

Telephone: 011 038 4300

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

The closing time for receipt of Proposals is at:

11h00 on Friday 05 September 2025

2. SUBMISSION DATA – SPECIFIC CONDITIONS OF CONTRACT.

1.	The Employer The Employer is SANEDI and is referred to as the CLIENT or EMPLOYER.
2.	Composition of Bid Document The Call for Proposals, the price quotation and the Enterprises responding submission documents forms part of a BID DOCUMENT and may be referred to such further herein. The documents associated with the calling for Proposals issued by the employer comprise: Submission Criteria • Notice and Invitation to Submit a Quotation • Submission Data – Specific Conditions of Contract • Evaluation Criteria and Scoring • Central Supplier Database (CSD) summary report Returnable Schedules • Enterprise Questionnaire • Technical Proposal & Methodology Statements • Specific Goals Declaration • Declaration of Interest • Certificate of Acceptance – General Conditions of Contract • Certificate of Acceptance – Bid Evaluation and Scoring Criteria • Certificate of Understanding – Scope of Works • Certificate of Attendance – Tender Clarification Meeting • Pricing Schedule / Schedule of Rates • Form of Tender • Schedule of Proposed Amendments and Qualifications • Record of Addenda or Errata to the Bid <i>NB: BIDDER MUST SUBMIT PROOF OF REGISTRATION WITH THE CONSTRUCTION INDUSTRY DEVELOPMENT BOARD IN AN APPROPRIATE CONTRACTOR GRADING DESIGNATION; (SUBMIT REGISTRATION NUMBER OR PROOF OF REGISTRATION APPLICATION)</i> Only respondents who submit fully completed Proposals incorporating all Returnable Schedules duly complete and signed will be eligible to have their submissions evaluated

3.	Bid Clarification Meeting A none- compulsory briefing meeting with representatives of the Employer will take place on the 22 August 2025 at 11:00am via Teams. Bidder must Join using the below Link. Microsoft Teams Join the meeting now Meeting ID: 353 776 528 050 6 Passcode: 7EH7SH28
4.	ELECTRONIC RETURN OF SUBMISSIONS AND NO MANUAL SUBMISSION WILL BE ACCEPTED. Submissions / Bid Documents may be returned to the CLIENT by means of Electronic Submissions via E-Mail. The Submission E-Mail address designated is 0725.procurement@sanedi.org.za The Bidder shall ensure that the Bid Documents Returnable Schedules together with all Statutory Returns are duly completed, signed and scanned and uploaded to the designated E-mail address in a lock PDF format file. Documents transmitted in an editable format will be regarded as non-returns and may render the submission unresponsive. Telephonic, telegraphic, telex, facsimile submissions offers will not be accepted. The size limits for SANEDI Email is 20 MB. Bidders may submit more than one E-mail.
5.	The closing time for submissions is as stated in the Notice and Invitation to Submit a Proposal Quotation, in the manner specified is Closing date: Friday, 05 September 2025 at 11h00 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.

6.	The Bidder holds SANEDI harmless and indemnifies SANEDI in the event of any failure that prevents or delays the bid submission from being in the designated Tender Box/email address at the time of Bid Closure. Bidders are prohibited from using SANEDI Staff acting as their couriers, agents or delivery mediums to deposit bids in the tender box, and the bidder acknowledges that the use of SANEDI staff in this way will immediately disqualify their tender submission. It is the sole responsibility of the bidder to ensure that the documents submitted via PDF format are not corrupt and that any corrupt documents received by the closing date will be automatically excluded from being evaluated.
7.	Information and data to be completed in all respects Accept that Bid offers, which do not provide all the data or information requested completely and in the form required, may be regarded by the Employer as non-responsive. Accept that the Employer shall not assume any responsibility for the misplacement or Premature opening of the tender offer if the Bid is not submitted in the required format and clearly marked with the bid reference and placed in the designated tender box before bid closing.
8.	SANEDI reserves the right to rotate suppliers according to SANEDI's rotation policy.
9.	SANEDI reserves the right to independently verify Information that is submitted by the bidder.
10.	Bidders are prohibited and will be disqualified if they share resources amongst themselves for the same tender e.g. the proposed team member of company "A" is also a team member of company "B".

3. PROJECT BACKGROUND

South Africa's Greenhouse Gas (GHG) emissions are high, in both absolute and per capita terms; mainly due to a primarily coal-based electricity supply industry, combined with a prevalent inefficient use of energy across many sectors. Public infrastructure, such as buildings, street lighting and water/ waste-water treatment plants, owned by and/or managed by municipalities, provinces, national government, and State-Owned Entities (SOEs), contribute to the country's GHG emissions.

Despite potential financial and energy savings, and emission reductions that could be achieved through demand-side energy efficiency interventions, uptake and implementation to date has been limited. This is due to a range of factors including: capacity and resource constraints, awareness of opportunities, comprehensive and accurate data on existing energy use, and access to finance.

To address these challenges and to fast track the large-scale roll out of energy efficiency across public institutions, the Department of Electricity and Energy (DEE) have developed the Energy Efficiency in Public Buildings and Infrastructure Programme (EEPBIP) in collaboration with the South African National Development Institute (SANEDI), the National Business Initiative (NBI) and the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ).

Energy Efficiency in Public Buildings and Infrastructure Programme (EEPBIP)

The objective of the EEPBIP, which commenced in 2019, is to reduce GHG emissions in South Africa by catalysing an energy efficiency transformation within the public-sector environment. This will be achieved through the provision of appropriate technical and financial support, and a programmatic approach to identifying, developing, financing, and implementing energy efficiency interventions in a consistent and replicable manner.

The EEPBIP aims to build on existing public sector programmes, including the municipal Energy Efficiency and Demand Side Management Programme (EEDSM), in addition to the Energy Performance Certificate regulations for buildings. The latent energy efficiency investment potential of the public sector can support a rapid and sustainable growth of the local Energy Service Company (ESCO) market and stimulate energy efficiency implementation across all sectors of society.

Energy Efficiency projects developed through the EEPBIP, will be tendered by public sector entities, and implemented by Energy Service Companies (ESCO's) through an Energy Performance Contracting (EnPC) model. The intention is to establish Shared Savings Contracts, with the ESCO providing the required debt and equity and recouping their investment and returns through electricity cost savings.

The EEPBIP supports the implementation of the National Energy Efficiency Strategy (NEES) and forms part of the overarching sector-wide Energy Efficiency and Energy Demand Management Flagship, a Near-term Priority Climate Change Flagship Programme, as prescribed in the National Climate Change Response Policy (NCCRP).

The implementation of the EEPBIP is supported by international climate finance, through the Mitigation Action Facility (MAF), alongside national funding for public sector energy efficiency programmes.

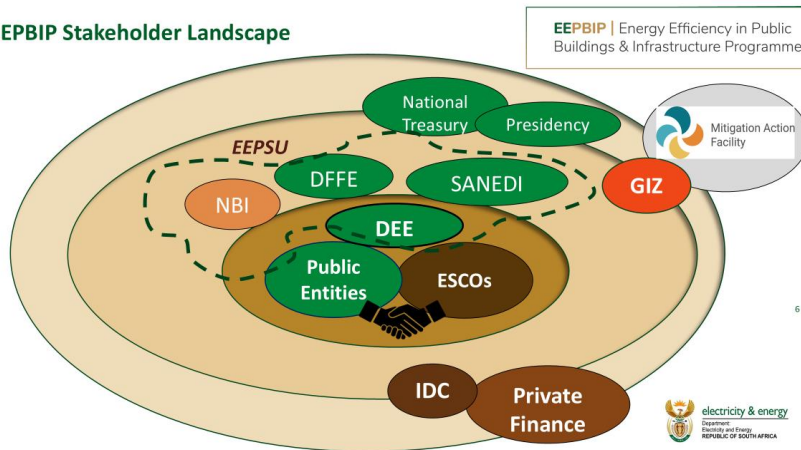
The EEPBIP comprises two key measures:

- **Technical Support:** An Energy Efficiency Project Support Unit (EEPSU) is established to provide technical assistance to public sector entities that have expressed an interest in participating in the programme. Activities will include:
 - assistance to institutions in identifying, quantifying and developing bankable energy efficiency projects
 - procurement support, including development of standardised Terms of Reference (ToRs), tender documents, and performance contracts
 - capacity building, institutional development and awareness raising
 - policy development support
 - Monitoring and Evaluation (M&E), and coordination of Measurement and Verification (M&V)
- **Access to finance:**
 - A Partial Credit Guarantee (PCG) Fund is established within the Industrial Development Corporation of South Africa Ltd (IDC). The PCG will assist in unlocking access to credit lines for private ESCOs investing in public sector energy efficiency projects, by providing a partial guarantee to IDC against defaults on loans. It is noted that ESCOs can independently source finance from the project; however, the PCG is only available presently through IDC lending.

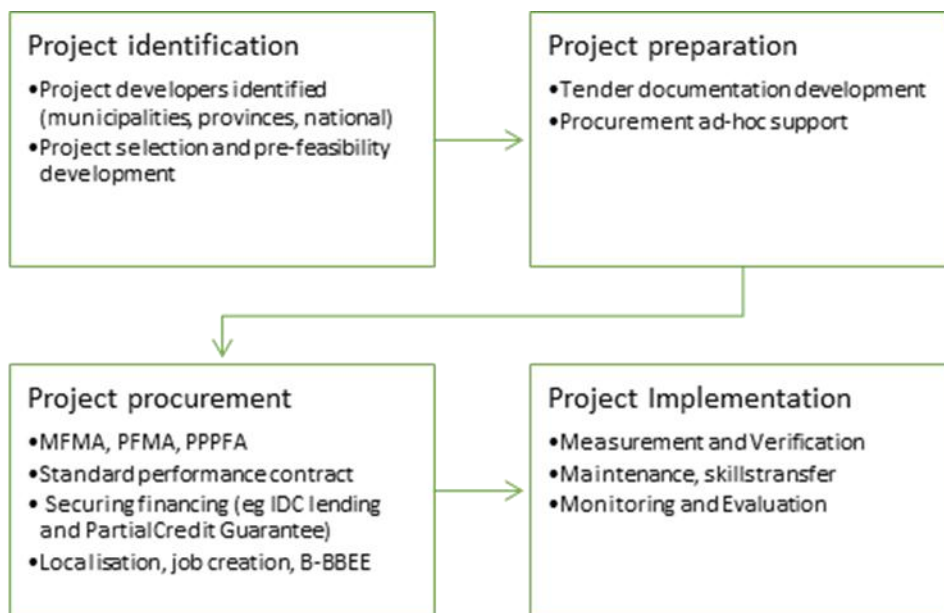
The key stakeholders directly involved in the EEPBIP are provide in Figure 1 below:

Figure 1: Key EEPBIP Stakeholders

EEPBIP Stakeholder Landscape



The key phases in the roll-out and implementation of energy efficiency projects in the public sector, focusing on municipalities, provincial governments, and State-Owned Entities, will comprise:



Public sector institutions, with the support from the EEPSU, will identify potential projects and prepare pre-feasibility studies, outlining the scope and scale of the project. These pre-feasibility studies will form the basis of the procurement process for contracting ESCOs.

The overall aim of the EEPBIP is to develop a standard project development model that can be rolled out across multiple different public sector institutions. This will build on the experience of interventions implemented and best practice, to scale up energy efficiency interventions and realise a significant impact in terms of energy reduction, cost savings, and the transition to a low-carbon economy.

In the context of the EEPBIP, energy efficiency projects may include energy efficiency and demand side management interventions on public sector buildings, street lighting, water pumping stations, and wastewater treatment plants. These can also incorporate small-scale embedded generation (SSEG) renewable energy projects, for example solar PV and biogas power generation.

Identification and Development of Energy Efficiency Projects

The EEPBIP is working with several public sector institutions (municipalities, provinces and SOEs), providing support on developing institutional capacity on energy management best practice and assisting in identifying, developing, and procuring potential energy efficiency projects.

Institutional Assessments will be conducted to provide an overview of key energy management capacities, namely: implementation, investment, marketing and communication, information systems, skills and knowledge, organization, and policy. Gaps are identified and recommendations are provided. Following the acceptance and approval of the Institutional Assessment, a Development Plan is prepared in collaboration with the institution to establish a clear pathway for addressing the gaps identified.

In parallel to the activities in preparing the Institutional Assessment and Development Plan, support is provided for project identification and development. A few public sector institutions are already developing pipelines for potential projects. These are at various stages of readiness, although most at early stage, some having completed high level energy audits and Energy Performance Certificates, through to one-page concepts and pre-feasibility studies.

Projects anticipated will include but not limited to:

- Energy efficiency retrofits in public buildings
- Energy efficiency retrofits of public/ street lighting
- Energy efficiency upgrades for water pumping stations
- Energy efficiency upgrades for waste-water treatment plants
- Installation of small-scale embedded generation

To take these high-level concepts through to contracting under an EnPC model, there is a need to establish the bankability of the projects, including the technical scope, the financial structure (estimated capex, financial savings, payback, institutional contributions etc), and to define the procurement model.

A draft Energy Performance Contract has been prepared under EEPBIP for use with public sector institutions. The draft Energy Performance Contract is to be refined and customised to meet the needs of the public institutions. These address many of the critical issues related to procurement under a shared savings model, although they may need to be adapted to specific institutional requirements. Where applicable the public institution may opt for guaranteed savings model.

SANEDI is inviting potential Contractors, with the required expertise and experience, to provide backstopping for twelve institutions, leading up to and during the ESCO procurement process. The three phases of proposed activities will require a range of skills and expertise, including legal and contract management, technical, financial, and local economic development. The level of support required for the different phases of the procurement process will be dependent on the specific needs of the institutions and approvals for the phase of activities.

- Phase 1 will require the Contractor to review project concepts and advise and support Institutions in preparation for their procurement process. This will include a high-level review and due diligence on the technical and financial scope based on available data.
- Phase 2 of the activities will include the development of a comprehensive and bankable Concept Business Case for implementation of the specific energy efficiency project and a review of the draft tender documentation and contract documents developed for the programme. The Concept Business Case will include technical specifications for the proposed technologies and a simple financial model, to support the procurement process for the appointment of an ESCO.
- Phase 3 requires the Contractor, to assist the public sector institution with technical backstopping for the ESCO procurement process, prior to tender issuance, during the bidding process, and during contract negotiations.

It is noted that not all institutions, where support is provided in Phase one, will progress to subsequent phases during the Transaction Advisory support period.

The Contractor may be required to sign a confidentiality agreement with the respective institution for the duration of the support activities.

4. PROJECT OBJECTIVES

The objective of this project is to contract Transactional Advisors (TAs) to provide tailored technical, financial, legal, contracts management and regulatory support to 12 public sector institutions for the development and implementation of energy efficiency projects under the Energy Performance Contracting (EnPC) model.

Specifically, the contracted TAs will:

- Support project preparation and procurement by guiding institutions through the conceptualisation, structuring, and packaging of energy efficiency projects for implementation via ESCOs.
- Develop and refine project documentation, including Concept Business Cases, financial models, technical specifications, Invitations to Tender, and draft Energy Performance Contracts, ensuring alignment with institutional requirements and national regulations.
- Advise on procurement and contracting strategies to ensure competitive, transparent, and legally sound engagement of ESCOs under a shared savings model.
- Build institutional capacity through training workshops, and knowledge transfer, enabling public institutions to independently manage future energy efficiency transactions.

5. SCOPE OF WORKS

Tasks to be performed by the contractor:

All phases, tasks and sub-tasks are subject to timing and approval by SANEDI and the respective institution and require written approval from SANEDI before commencement. Certain elements of these tasks may or may not be required, subject to the needs of the Institution.

It is noted that Capacity Development for institutions supported is a key component of this activity. For recommendations provided to an institution or support given on reviewing documents etc, the key findings must be provided both in written form (reports/ presentation) and through workshops and training, to assist in building capacity on key project development activities. Certain Energy Management best practices and some of the technical, financial, and regulatory concepts and processes being applied using an Energy Performance Contracting model may be unfamiliar to some officials. Capacity building and training will ensure the sustainability of the project and leverage the replication of additional projects.

The contractor is responsible for providing the following services:

5.1 Project Management

The Contractor will be required to participate with SANEDI in a kick-off meeting to clarify the scope of the activities and ensure alignment of expectations. SANEDI will provide an update on the status of fast-track projects and indicative timelines on when support may be required and the type of support.

- *Deliverable 1a: The Contractor will be required to prepare a brief Inception Report (maximum ten pages), that includes indicative timelines, resource availability, and a confirmation of the joint understanding of expectations for the implementation of activities*
- *Deliverable 1b: The Contractor will be required to arrange monthly calls with the steering team and provide brief monthly Progress Reports (1-3 pages within 5 working days of the end of the calendar month). The Report shall highlight the activities carried out during the period, any challenges encountered, and recommendations to be considered for ongoing activities. The report will also provide a simple table on days used to date and available resources.*
- *Deliverable 1c: A Final Report will summarise the activities carried out (monthly reports to be included as Annexes) and provide specific recommendations on potential improvements to the support services to be provided to institutions, in addition to recommendations on the draft template Invitation to Tender and draft template Energy Performance Contract*
- *Deliverable 1d: A maximum of two training/ knowledge dissemination workshops for each participating institution: one presenting the project development and analysis approach mid-way through the project and secondly the final report and key findings.*

Phase 1: Project Conceptualisation

Task 1: Project Conceptualisation Support

Institutions will be using an open and transparent procurement process for project implementation to encourage participation of a broad spectrum of local, regional, and national ESCOs, with the relevant experience, expertise and ability to raise finance. It is expected that the procurement processes will make available building/ infrastructure data, billing data and energy audits and provide the opportunity for ESCOs to carry out a site visit.

The Contractor may be required to support the institution in drafting technical specifications for the proposed intervention in addition to supporting the preparation of procurement documentation, which may include, the Request for Proposals and the Energy Performance Contract. Activities may therefore include:

- Review of energy audits of buildings and infrastructure to verify accuracy of data and recommendations
- Review of energy bills
- Review of proposed interventions
- Preparation of simple financial analysis to estimate CAPEX requirements and payback period
- Review of proposed procurement process, including support on preparation of detailed procurement plan to identify all required activities (for example preparation and submission of Section 33 for municipalities, approvals etc) Conduct risk assessment per institution and propose mitigation strategies.

The level of support will depend on the specific needs of the Institution. This will be agreed in advance with the institution, SANEDI and the Contractor.

Deliverable 2a: The Contractor shall provide a summary report for the support provided per institution, including any relevant documentation. This may also include recommendations on updating the draft standard Invitation to Tender documents and the draft Energy Performance Contract.

Deliverable 2b: The Contractor shall host workshops as required with the respective institution, physical or online, to ensure transfer of knowledge build capacity on key findings and processes (venues, catering etc to be provided by SANEDI/ institution)

5.2 Phase 2: Concept Business Case and Invitation to Tender Preparation

Phase 2 will focus on supporting the development of a Concept Business Case for the implementation project and the finalisation of key tender documents.

This phase will commence, subject to approval of the project and approach by the leadership of the institution. It is noted there may be a delay in getting approval due to decision making processes.

Task 2.1 Concept Business Case Preparation

Task 2.1. focuses on the development of a bankable Concept Business Case for implementing the identified large-scale energy efficiency interventions at the institution using an EnPC model. The Concept Business Case will be developed based on analysis of available information (billing data; energy audits etc), submissions from bidders during any RFI process, and comprehensive site visits.

A Concept Business Case template has been prepared and can be used as a guideline; however, this can be amended and adapted to the requirements of this project activity.

The Concept Business Case preparation is expected to require sub-tasks focused on technical, financial, institutional, socio-economic, and monitoring and evaluation aspects. The Concept Business Case may be utilised to finalise the second stage of the procurement process, including the preparation of detailed specifications, and may be made available to potential ESCOs with the bidding documentation. The specific scope of work for the Concept Business Case will be defined for each project and agreed by all parties before commencement.

As described earlier, the Contractor is to note that institutional capacity development is critical to the long-term success of both this project and the overall programme. Throughout the various steps of the support activities, the Contractor is to ensure that the outputs of the various components and sub-tasks are reported back to the respective institution not just as reports, but also through detailed presentations and training.

Technical

i) Review and analysis of billing data

The contractor is to review and analyse the existing billing data for each meter, identify potential errors or areas of concern, and provide recommendations for optimisation and cost reduction where applicable (e.g. ensuring buildings/ infrastructure are on the correct tariffs; adjustment of Notified Maximum Demand etc.).

ii) Review and analysis of information obtained from the RFI (if applicable)

Review and analyse information submitted by ESCO's during any RFI process and where applicable, provide recommendations to integrate in the final Concept Business Case.

iii) Review the existing Audit Data and Baseline Energy audits are expected to have been carried out, including high-level recommendations for proposed energy efficiency interventions. The Contractor must conduct a desktop study to review existing energy audits, prefeasibility studies, and baselines for each building. In addition, site visits must be undertaken to confirm and update the baseline of the buildings to ensure that it is accurate and reliable. This includes addressing any missing data that impacts materially on the Concept Business Case and filling the gaps identified. Any deviation on the baseline, due to issues such as non-functioning installed equipment, must be incorporated into the updated baseline and clearly noted. It is critical that the institution is aware of any electricity usage and costs increases, resulting from suppressed demand.

It is noted that this baseline will only be for guidance and information purposes as part of the tender. The appointed ESCO will be required to develop, verify, and commit to their own baseline, which will be the foundation of the EnPC and the basis for the Measurement and Verification of savings.

- iv) *Provide Recommendations for Energy Efficiency Interventions* Based on the energy baselines and analysis, the Contractor shall identify and recommend appropriate bankable energy efficiency interventions. This may include updating existing recommendations from the energy audits. Recommendations shall include energy and demand savings, the resultant financial savings, and capex requirements.
- v) *Identify potential for Small-Scale Embedded Generation (SSEG) (e.g. PV)*

The contractor is required to undertake a high-level solar PV analysis as a measure to identify the viability and potential of installing SSEG. The following factors (not limited to) should be considered in the analysis:

- The annual availability of sunlight
- The area available
- The orientation of the location towards the sun
- Identification of possible objects that could hinder the exposure of the panels to the sunlight (i.e., high-rise buildings, trees etc.)
- Determination of how much area to use for solar panels, including the availability of sunlight, the space available; and the maximum power that can be generated for producing electric power.
- The assessment shall include an overview of the potential energy generated, the impact on demand, and capex costs.

It is noted that this analysis will only be for guidance and information purpose as part of the tender. The appointed ESCO will be required to develop, verify, and commit to their own analysis, which will form part of their proposal under EnPC.

- vi) *Develop the Technical Specifications*

Technical specifications for the tender documentation for the project shall be developed, as required. The specifications must take into consideration both the energy efficiency and SSEG interventions.

Financial

i) Prepare a Financial Model

The Contractor is to prepare a high-level financial model that will establish the viability of the combined potential interventions. The following indicators, although not exhaustive, should be included in the analysis – Capital Investment (Capex), Operational and Maintenance Costs, Net Present Value (NPV), dynamic payback period, internal Rate of Return (IRR), site energy costs, first year saving and GHG emission reductions. The technical recommendations (described above) should be considered when developing the financial model. The financial model may also be used to support the MFMA section 33 process (if required).

In addition, if required, the Contractor shall provide cost estimate ranges for the technical specifications developed above.

ii) Identify other Potential Sources of Funding

In addition to funding raised by ESCOs, and recouped through energy savings, the Contractor is to identify other sources of funding or revenue streams that could contribute to the success of the project. This may include existing programmes that the institution is participating in (e.g., a CAPEX contribution via EEDSM grant funding) or other programmes that focus on municipal support, energy efficiency or demand side management (e.g., Eskom's Demand Side Management (DSM) initiatives). It is noted that the Eskom DSM funding is also based on a performance contracting model and in theory could be included in the project if there is no other government subsidy; however, the actual application and mechanism for funding would need to be confirmed.

iii) Advise on any other relevant Financial Issues

The service provider is to advise on any other relevant financial issues which may either support or negatively impact on the project. This may relate to the financial structure of the project, with reference to either the institution or the ESCO, including performance contracting issues.

Socio-economic

i) Undertake a Socio-Economic Analysis

In line with the National Development Plan (NDP), job creation, transformation, GESI, and enterprise development are key components for all public sector activities. It is essential for public institutions to leverage local economic benefits over and above the direct energy and financial savings to the institution. This may include supporting an increased localisation of job creation, contracting, content and manufacturing.

The Concept Business Case is to include recommendations on socio-economic opportunities that can be realised through the implementation of the proposed interventions. In this regard, the Contractor is to undertake a high-level socio-economic analysis and provide recommendations on procurement and contracting structures to enhance local economic development, job creation and support the inclusion of local small, medium and micro enterprises. This is in addition to regulated preferential procurement and Broad-Based Black Economic Empowerment (B-BBEE)/ specific empowerment goals requirements for the institution.

Monitoring and Evaluation

i) Recommend a Measurement and Verification (M&V) Approach

The M&V is a critical component to accurately measure and verify the energy savings achieved throughout the project. A rigorous and transparent M&V process will reduce the risk of queries on the energy savings and thus reduce the risk of delays in payments to the ESCO.

Whilst the M&V plan will be finalised in the contracting phase, it is important that general approach is agreed upon. The Contractor is to recommend an effective M&V approach in the Concept Business Case.

ii) Recommend a Monitoring and Evaluation (M&E) Mechanism

As a national programme, there is a need for the outcomes, outputs and targets resulting from the project to align and contribute towards the broader EEPBIP log frame and related national targets. It is also important to capture data on the non-technical activities and impacts of the project.

An overall M&E framework has been developed by the DEE for energy efficiency in public buildings and infrastructure in South Africa and an M&E system for the EEPBIP is being established.

Key data must be collected relating to the development and implementation of the project, including energy savings, GHG emission reductions, capital costs, financing costs, public and private sector investments, maintenance costs, in addition to socio-economic data, for example job creation, local economic development, and gender impacts. The Contractor is to recommend measures to collect such data and report this to the EEPSU on a regular ongoing basis.

Task 2.2 Institutional Feedback and Training

The Contractor shall present the outcomes of the Concept Business Case to the respective institution and SANEDI combined with a targeted training that takes account of key technical, financial, socio-economic and M&E related concepts and methodologies applied.

Task 2.3 Preparation of the Tender Documents

Experts may be required to support the institution in developing and/or finalising the EnPC tender documents for the project by providing relevant legal, financial, and technical advice whilst ensuring the incorporation of social and local economic development aspects. Support may be required, for example, on the development of a technology-specific economic development plan with components such as local content, local employment, skills development, and BBBEE/specific empowerment goals, based on the characteristics of the technology type that is compliant with legislative requirements and best practices.

A draft Energy Performance Contract has been developed. The Contractor may be required to review and adapt the existing draft EnPC template.

Task 2.4 Policy and Regulatory Support

If the contracting period for the project is expected to be longer than three years, then a Section 33 process of the Municipal Finance Management Act (MFMA) must be carried out for Municipal projects.

Subject to requirements, the Contractor may be required to provide backstopping and support to the institution in undertaking the requirements under Section 33 of the MFMA, such as supporting the preparation of relevant documentation.

The Contractor is to identify and advise on any other policy and regulatory steps that the institution will need to consider during the implementation of an energy performance contracting model. This may for example include other issues related to the MFMA/ PFMA or the Preferential Procurement Regulations.

Deliverable 3a: The Contractor is to develop a combined bankable Energy Efficiency Concept Business Case per intervention (subject to requirements from the institution), The Contractor is to ensure, with the information available, that the project is in a state of readiness for tendering to ESCOs.

Deliverable 3b: The Contractor is to develop the technical specifications for the energy efficiency and solar PV equipment and interventions, to be used in the procurement process

Deliverable 3c: The Contractor is to provide an updated invitation to tender and energy performance contract with a high-level summary report on the changes.

Deliverable 3d: The Contractor is to host a training workshop on the key elements and issues related to the Concept Business Case, Technical Specifications, and policy issues.

Deliverable 3e: The Contractor is to prepare a summary report on the training and capacity development delivered to the institution as per the tasks above. The summary report is to

provide attendance registers, and highlight the concepts presented and key points of discussion.

5.3 Phase 3: Tender Implementation Support

Phase 3 will commence, subject to approval of the project and approach by the leadership of the respective institution. There may be a delay resulting from decision making processes.

The aim of Phase 3 is to provide the required support to the institution during the procurement and contracting stage of the project. As energy performance contracting models for public sector energy efficiency projects are still a new instrument in South Africa, many public institutions are constrained with limited in-house specific knowledge, experience and expertise to design and administer these initiatives. Phase 3 of this contract therefore will establish a team of experts to provide advice and backstopping during the procurement process for the project developed in Concept Business Case. The team shall comprise technical, legal, financial, and socio-economic experts. The support provided in this phase will be subject to written requests from the institution based on their specific needs. This may be during the procurement planning period, the bidding period, and/ or during the contract negotiation period.

Task 3.1: Finalising the Tender Documentation

The Contractor may be required to support the institution in finalising the tender documents reviewed above. (invitation to tender and energy performance contract) and other supporting documents. The Contractor shall support the institution to ensure that the tender documents are ready for issuing.

Task 3.2: Backstopping the Invitation to Tender Process

The Contractor may be required to address clarifications and queries from ESCOs, received by the institution during the tender process. Support may be required preparing responses on specific technical, financial, or contractual matters.

Task 3.3: Support the Evaluations

The Contractor may be required to provide support and advice during the evaluation of the submissions received, if required and requested by the institution.

Task 3.4: Support the Funding Competition Process

Backstopping may be required by the institution during the funding competition process, to ensure good financial standing of the ESCO being appointed, and that the funding proposed provides the most appropriate financial solution for the project and the institution.

Task 3.5: Support the Contract Negotiations

The Contractor may be required to provide advice on technical, legal, financial and socio-economic aspects during the contract negotiations between the institution and the ESCO.

Deliverable 3a: The Contractor shall provide a summary report for the requests received and the support provided, including any relevant documentation.

- The Contractor is responsible for selecting, preparing and steering short-term experts assigned to perform the advisory tasks.
- The Contractor manages costs and expenditures, accounting processes and invoicing in line with the requirements of SANEDI.
- The Contractor reports regularly to SANEDI.

Certain milestones, as laid out in the table below, are to be achieved during the contract term:

Milestones/process steps/partial services	Deadline/place/person responsible
<i>Deliverable 1a: The Contractor will be required to prepare a brief Inception Report (maximum ten pages), that provides indicative timelines, resource availability, and confirmation and joint understanding of expectations for the implementation of activities.</i>	<i>As required</i>
<i>Deliverable 1b: The Contractor will be required to arrange monthly calls with the steering team and provide brief monthly Progress Reports (1-3 pages). The Report shall highlight the activities carried out during the period, any challenges encountered, and recommendations to be considered for ongoing activities. The report will also provide a simple table on days used to date and available resources.</i>	<i>Within 5 working days of end of the calendar month)</i>
<i>Deliverable 1c: A Final Report will summarise the activities carried out (monthly reports to be included as Annexes) and provide specific recommendations on potential improvements to the support services to be provided to institutions, in addition to recommendations on the draft template Invitation to Tender and draft template Energy Performance Contract</i>	<i>As required</i>
<i>Deliverable 1d: A maximum of two training workshops to key public sector beneficiaries: one presenting the project development and analysis approach mid-way through the project and secondly the final report and key findings.</i>	<i>As required</i>
<i>Deliverable 2a: The Contractor is to develop a combined bankable Energy Efficiency Concept Business Case for the intervention (subject to requirements from the institution), The Contractor is to ensure, with the information available, that the project is in a state of readiness for tendering to ESCOs.</i>	<i>As required</i>
<i>Deliverable 2b: the Contractor is to develop the technical specifications for the energy efficiency and solar PV equipment and interventions, to be used in the procurement process</i>	<i>As required</i>

<i>Deliverable 2c: the Contractor is to provide an updated invitation to tender and energy performance contract with a high-level summary report on the changes.</i>	As required
<i>Deliverable 2d: the Contractor is to host a training workshop on the key elements and issues related to the Concept Business Case, Technical Specifications, and policy issues.</i>	As required
<i>Deliverable 2e: the Contractor is to prepare a summary report on the training and capacity development delivered to the institution as per the tasks above. The summary report is to provide attendance registers, and highlight the concepts presented and key points of discussion.</i>	As required
<i>Deliverable 3a: The Contractor shall provide a summary report for the requests received and the support provided, including any relevant documentation.</i>	As required

Period of assignment: from contract signing date to 31 August 2026.

Concept

In the tender, the tenderer is required to show *how* the objectives defined in Chapter 3 (Tasks to be performed) are to be achieved, if applicable under consideration of further method-related requirements (technical-methodological concept). In addition, the tenderer must describe the project management system for service provision.

Technical-methodological concept

- *Provide an interpretation of the project objectives, demonstrating a clear understanding of the scope of work.*
- *Described the proposed strategy to deliver services, referencing the main tasks and deliverables outlined in Chapter 3 (Tasks to be performed).*
- *Present an implementation plan that details key activities, timelines, milestones and how partners contribution will be integrated.*
- *Identify and describe collaboration with key stakeholders, including internal and external EEPBIP partners and outline how coordination will be managed.*
- *Describe the contractor's contribution to knowledge management for the institution.*

Project Management and Coordination of the Contractor

- *Describe the proposed project management and coordination approach, including mechanisms to engage with [INSERT NAME OF INSTITUTION], and other relevant actors.*

- *Provide a personnel assignment plan indicating expert roles, level of effort (in expert months), and alignment with tasks and timelines.*
- *Describe the contractor's backstopping arrangements and internal quality assurance processes.*

Deliverables and Reporting

- *Confirm adherence to all deliverables as listed in the Terms of Reference*
- *Describe proposed reporting mechanisms and timelines, including inception, progress, and final reports, as well as knowledge dissemination materials*

Personnel concept

The tenderer is required to provide personnel who are suited to filling the positions described, based on their CVs (see Chapter 8 for the requirements), the range of tasks involved and the required qualifications.

The below specified qualifications represent the requirements to reach the maximum number of points in the technical assessment.

Team leader / Project Manager

Tasks of the team leader

- Overall responsibility for the advisory packages of the Contractor (quality and deadlines)
- Responsibility for coordinating and ensuring communication with SANEDI, partners and others involved in the project
- Personnel management, identifying the need for short-term assignments within the available budget, as well as planning and steering assignments and supporting local and international short-term experts
- Regular reporting in accordance with deadlines
- Responsibility for the day-to-day management of project activities
- Coordinating personnel and logistics regarding short-term experts

Qualifications of the team leader

- Education/training: university degree in energy, engineering, law, or related sector
- *Language: proficiency in English*

select an element

- General professional experience: 10 years of professional experience in the energy sector
- Specific professional experience: 5 years in developing or contracting energy efficiency projects
- Leadership/management experience: 10 years of management/leadership experience as project team leader or manager in a company
- Regional experience: 10 years of experience in projects in South Africa
- Development cooperation (DC) experience: Not applicable

Experts Pool

For the technical assessment, an average of the qualifications of all specified members of the expert pool is calculated. Please send a CV for each pool member for the assessment.

Tasks of short-term expert pool 1

- Support on initial project review and evaluation of the submissions by ESCOs under any Request for Information
- Support the development of the Concept Business Case under Phase 2, as required
- Support in the updating and amendment of Invitation to Tender and draft Energy Performance Contract documentation, as required
- Support on responding to requests for clarification and queries from ESCOs during Invitation to Tender, as required
- Support on review and evaluation of the submissions by ESCOs under the Invitation to Tender, as required
- Support to institutions during the contract negotiation process, as required
- Experts to be able to provide technical, financial, and legal/ regulatory support

Qualifications of short-term expert pool 1 (Senior Experts)

- Education/training:
 - 1 expert with university qualification in electrical engineering, energy, or related subject
 - 1 expert with university qualification in law, or related subject
 - 1 expert with university qualification in finance, or related subject
- General professional experience:
 - 3 experts with 10 years of professional experience in the energy sector (technical, legal, financial),
- Specific professional experience:
 - 1 expert with 5 years of professional experience in engineering/ technical aspects of energy project development,
 - 1 expert with 5 years of professional experience in legal and regulatory aspects of energy project development
 - 1 expert with 5 years professional experience in energy project financing

Soft skills of team members

In addition to their specialist qualifications, the following qualifications are required of team members:

- Team skills

- Initiative
- Communication skills
- Socio-cultural skills
- Efficient, partner- and client-focused working methods
- Interdisciplinary thinking

The tenderer must provide a clear overview of all proposed short-term experts and their individual qualifications.

6. COSTING REQUIREMENTS

- Use of the provisional sum item requires prior written approval from SANEDI.
- Units/ Days can be spread across the pool members and Team Leader/Project Manager.
- SANEDI reserves the right to increase or reduce the number of institutions to be supported.
- SANEDI reserves the right to decrease the scope of work.
- Service providers are expected to provide hourly rate per resource.
- Service providers will be appointed based on proposed total value of the project.
- The SLA will be concluded based on the hourly rates.
- Units/ Days can be spread across the institutions. The required units for institutions may vary according to complexity, level of preparedness of the institutions, scope of work.

6.1. Assignment of personnel and travel expenses

All travel will be costed as per disbursement schedule.

All business travel must be agreed in advance by the officer responsible for the project.

Pricing schedule: Refer to Annexure A

6.2. Workshops and training

Please describe in your concept how you implement minimum standards for sustainable event management.

The contractor implements the following workshops/study trips/training courses:

- Workshops and training will be required for specific institutions.
- Some training sessions may be held online.

7. Inputs of SANEDI or other actors

SANEDI and/or other actors are expected to make the following available:

Logistics for workshops: Workshops with institutions will be arranged by the specific institution

8. Appointment of service provider

SANEDI reserves the right to appoint more than one service provider to equitably share project deliverables within the required timelines.

9. Requirements on the format of the tender

The structure of the tender must correspond to the structure of the ToRs. In particular, the detailed structure of the concept (Chapter 4) should be organised in accordance with the positively weighted criteria in the assessment grid (not with zero). The tender must be legible (font size 11 or larger) and clearly formulated. It must be drawn up in English (language).

The complete tender must not exceed 10 pages (excluding CVs). If one of the maximum page lengths is exceeded, the content appearing after the cut-off point will not be included in the assessment. External content (e.g. links to websites) will also not be considered.

The CVs of the personnel proposed in accordance with Chapter 5 of the ToRs must be submitted using the format specified in the terms and conditions for application. The CVs shall not exceed 4 pages each. They must clearly show the position and job the proposed person held in the reference project and for how long. The CVs can also be submitted in English (language).

Please calculate your financial tender based exactly on the parameters specified in Chapter 6 Quantitative requirements. The contractor is not contractually entitled to use up the days, trips, workshops or budgets in full. The number of days, trips and workshops and the budgets will be contractually agreed as maximum limits. The specifications for pricing are defined in the price schedule

10. Project duration

From contract signing **date (1 September 2025) up to 31 August 2026 (12 Months)**.
SANEDI reserve the right to revise and extend the project duration

11. EVALUATION CRITERIA

NO.	EVALUATION CRITERIA	SCORING (Scoring Guideline 0 to 5)	WEIGHT (%)
1.	TEAM LEADER AND KEY EXPERTS		40
1.1.	TEAM LEADER / PROJECT MANAGER		10
	1.1.1. Should at least have qualification in energy, engineering, law or related sectors. Certified copies of certificates should be attached to the proposal as proof. Failure to attach, bidder(s) will forfeit points. 1.1.2. Team leader must have 10 years' experience in developing viable energy related projects and implementation thereof. He/she must be energy management specialist with strong technical expertise, project management and business development. He/she should have led 5 projects that developed and implemented energy projects. Contact details for reference checks in line with the 5 projects should be provided.	Qualification points: • 5 = PHD Degree • 4 = Master's Degree • 3 = Honours Degree • 2 = Degree • 1 = Diploma/ certificate/ related short courses • 0 = No qualification submitted Years of Experience points: • 5 = ≥10 years' experience with ≥10 projects • 4 = 8 - 9 years' experience with 8 – 9 projects • 3 = 6 - 7 years' experience with 6 – 7 projects • 2 = 4 – 5 years' experience with 4 – 5 projects • 1 = ≤3 years' experience with 3 projects or less • 0 = irrelevant/ no experience	5 5
1.2.	ENERGY EXPERT		10
	1.2.1. The Energy Expert should possess a relevant qualification in energy, engineering, environmental sciences, sustainable development, or related field. Certified copies of certificates should be attached to the proposal as proof. Failure to attach, bidder(s) will forfeit points. 1.2.2. The Energy Expert must have a minimum of 5 years' practical experience in conducting energy audits, recommending cost-effective energy efficiency solutions, and developing alternative energy	Qualification points: • 5 = PHD Degree • 4 = Master's Degree • 3 = Honours Degree • 2 = Degree • 1 = Diploma/ certificate/ related short courses • 0 = No qualification submitted Years of Experience points:	5 5

	scenarios for different building types or facilities. The candidate must demonstrate technical capability in energy data analysis, report writing, and advising clients on implementation pathways. They should have participated in or led at least 3 projects where such work was successfully carried out. Specific professional experience: 3 years in developing or contracting energy efficiency projects Contact details for reference checks must be provided for each of the 3 projects.	• 5 = ≥10 years' experience with ≥10 projects • 4 = 8 - 9 years' experience with 8 – 9 projects • 3 = 6 - 7 years' experience with 6 – 7 projects • 2 = 4 – 5 years' experience with 4 – 5 projects • 1= ≤3 years' experience with 3 projects or less • 0 = irrelevant/ no experience	
1.3.	FINANCE EXPERT		10
	1.3.1. Should have a degree in finance or economics qualifications. Certified copies of certificates should be attached to the proposal as proof. Failure to attach, bidder(s) will forfeit points. 1.3.2. Must have at least (3) years' experience in the structuring of financing energy projects. Contact details for reference checks in line with the 3 projects should be provided.	Qualification points: • 5 = PHD Degree • 4 = Master's Degree • 3 = Honours Degree • 2 = Degree • 1= Diploma/certificate • 0 = No qualification submitted Years of Experience points: • 5 = ≥10 years' experience with ≥10 projects • 4 = 8 - 9 years' experience with 8 – 9 projects • 3 = 6 - 7 years' experience with 6 – 7 projects • 2 = 4 – 5 years' experience with 4 – 5 projects • 1= ≤3 years' experience with 3 projects or less • 0 = irrelevant/ no experience	5 5
1.4.	LEGAL EXPERT		10
	1.4.1. A Legal Expert must have a degree in legal qualifications. Certified copies of certificates should be attached to the proposal as proof. Failure to	Qualification points: • 5 = Admitted Attorney • 4 = Master's Degree • 3 = Honours Degree • 2 = Degree	5

	attach, bidder(s) will forfeit points. 1.4.2. A Legal Expert with at least three (3) years' experience providing legal expertise on implementation of energy related projects and drafting of required legal agreements. Contact details for reference checks in line with the 3 projects should be provided.	• 1= Diploma/certificate • 0 = No qualification submitted Years of Experience points: • 5 = ≥10 years' experience with ≥10 projects • 4 = 8 - 9 years' experience with 8 – 9 projects • 3 = 6 - 7 years' experience with 6 – 7 projects • 2 = 4 - 5 years' experience with 4 – 5 projects • 1 = ≤3 years' experience with 3 projects or less • 0 = irrelevant/ no experience	5
2.	PROJECT METHODOLOGY & PLAN		35
	2.1. A clear methodology, milestones, and timelines within the duration of the projects. The methodology must outline how the planned work will be carried out showing clearly how each task will logically lead to specific deliverables.	• 5 = Project methodology with logical linked activities, milestones, and timelines • 4 = 3 Project methodology with activities, milestones, and timelines • 3 = Project methodology with milestones and timelines • 2 = Project methodology with milestones • 0= No project methodology	20
	2.2. Management structure with roles and responsibilities of both team leader and team members.	• 5 = Comprehensive and well-integrated structure with clearly defined realistic roles and responsibilities. Includes clear lines of communication, reporting relationships, and decision-making processes. • 4 = Clear and logical management structure with well-defined roles and responsibilities for both the Team Leader and all team members. • 3 = Adequate structure with general roles and responsibilities for the Team Leader and most team members. Some minor gaps exist. • 2 = Basic structure provided, but roles and responsibilities are vague, incomplete, or only partially relevant. • 0 = No management structure provided, or structure is unclear, and roles are not defined at all.	10

	2.3. Partnering with local SMME's to support transformation, enterprise development and skills transfer. NB: A copy of the company's organogram indicating all team members must be included in the proposal.	• 5 = Strong, well-detailed plan with formal partnerships, clear skills transfer, and proven impact. • 4 = Clear and practical plan with defined roles and some evidence of past SMME support. • 3 = General commitment with limited detail and no strong evidence. • 2 = Minimal mention, vague intention without a clear plan. • 0 = No mention of SMME support or transformation initiatives.	5
3.	COMPANY EXPERIENCE		25
	3.1. The bidder(s) experience/track record in providing advisory and support on procurement of energy related must be supported by five (5) reference signed letters for relevant projects with contact details of the clients as proof of the projects executed. Note: If more than one (1) of the listed relevant projects were undertaken for the same client, one (1) letter from the client listing all the projects will suffice. These must be separate i.e. different locations. For example, if one (1) client lists three (3) relevant projects then the letter will be scored as three (3) projects instead of one (1) project if all three (3) projects are relevant. It should be noted that proposals that are unclear and do not adhere to the instructions will forfeit points.	• 5 = ≥7 reference letters • 4 = 6 reference letters • 3 = 5 reference letters • 2 = 2 reference letters • 1 = 1 reference letter • 0 = irrelevant / no reference letter provided	25
	TOTAL		100%
	THRESHOLD		70%

13. 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

13.1 General Condition

13.1.1 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).

13.1.2 Preference Points applicable:

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

13.1.3 Points for this tender shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

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

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

13.1.5 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.

13.1.6 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.

14. 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;

15. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

15.1. POINTS AWARDED FOR PRICE

15.1.1 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

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

16. POINTS AWARDED FOR SPECIFIC GOALS

16.1. 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:

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

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

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)			Number of points claimed (80/20 system) (To be completed by the tenderer)
	Total points possible	Indicator	Points allocated	
B-BBEE Status level of Contributor	10	Level 1	10	
		Level 2	9	
		Level 3	8	
		Level 4	5	
		Level 5	4	
		Level 6	3	

		Level 7	2	
		Level 8	1	
		Non-compliant	0	
Women	5	Women Owned 76% - 100%	100%	
		Women Owned 51% - 75%	75%	
		Women Owned 26% - 50%	50%	
		Women Owned 5% - 25%	25%	
		Women Owned less than 5% - 0%	0%	
Youth	2.5	Youth Owned 76% - 100%	100%	
		Youth Owned 51% - 75%	75%	
		Youth Owned 26% - 50%	50%	
		Youth Owned 5% - 25%	25%	
		Youth Owned less than 5% - 0%	0%	
Persons with Disability	2.5	Person with Disability 76% - 100%	100%	
		Persons with disability 51% - 75%	75%	
		Persons with disability 26% - 50%	50%	
		Persons with disability 5% - 25%	25%	
		Persons with disability less than 5% - 0%	0%	
TOTAL FOR SPECIFIC GOALS	20			

17. DECLARATION WITH REGARD TO COMPANY/FIRM

17.1 Name of the company/firm.....

17.2 Company registration number:.....

17.3 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	

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

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

(e) forward the matter for criminal prosecution, if deemed necessary.

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

18. RETURNABLE SCHEDULES

19. BIDDER'S DECLARATION OF INTEREST

BIDDER'S DISCLOSURE

THE DECLARATION 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.

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

YES/NO

- 20.1.1 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

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

20.2.1 If so, furnish particulars:

.....
.....

20.3 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

20.3.1 If so, furnish particulars:

.....
.....

20. 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:

- 21.1 I have read and I understand the contents of this disclosure;
- 21.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 21.3 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 consortium¹ will not be construed as collusive bidding.

¹ 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.

21.4 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.

21.4 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.

21.5 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.

21.6 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

.....

name).....

21. 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

22. 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

23. 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

AMOUNT IN WORDS To be carried forward to Section 8 Form of Tender BID 0725 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

24. FORM OF TENDER

i)	<u>Conditions of Acceptance</u> ▪ The Tenderer is required to complete this FORM of TENDER in every respect, and tenders will not be considered unless this FORM of TENDER is completed in every particular and each page is initialled by the tenderer and fully signed on this page. ▪ This Form of Tender shall be completed by the tenderer in black ink and no corrections, use of correcting fluids or any alterations will be permitted. ▪ The FORM of TENDER and price schedules shall be stated in South African Rand (ZAR) and the price indicated on the schedules shall be binding on the tenderer, and no exception shall be made for omissions, casting errors or errors of whatsoever nature. ▪ Where a tenderer is not returning a price for a line item, or costs associated with that line item are included in another line item, the tendered shall endorse that line item with the words, “No Cost” or “incorporated in Item (NO.....)” whichever being applicable.
ii)	<u>Confidentiality</u> All information pertaining to the services acquired by SANEDI from the service provider or furnished to the service provider shall be treated as confidential by the service provider and shall not be used or furnished to any other person other than for the purposes of the services without the written Consent of the Accounting Officer unless such information is or later becomes public knowledge, other than by breach of the afore-going.
iii)	The service provider shall ensure that all its officers, employees, agents or subcontractors treat all information relating to the services as confidential.
iv)	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.
v)	Failure by the service provider to comply with the provisions of this Clause shall constitute a material breach of the contract and shall constitute a ground for termination of the contract by SANEDI, by giving the service provider thirty days’ notice.
vi)	<u>Priced Proposal</u> The Bid is a <u>FIXED PRICE PROPOSAL</u> and clause 48 shall apply. Clause 49 is not applicable.
vii)	<u>FIXED PRICE PROPOSAL</u> The price quoted in the pricing schedule and returned in the Form of Tender is returned as a FIXED PRICE PROPOSAL valid for a period of contract and is not subject to cost price escalations, foreign currency variation or additionality as agreed in the Conditions of Contract

viii)	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.
ix)	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.
x)	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.
xi)	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.
xii)	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.
xiii)	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 0725 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.
xiv)	We/I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents in accordance with the SANEDI STANDARD CONDITIONS OF CONTRACT pertaining to the supply of goods and services. The Bidder is advised to familiarise themselves with the SANEDI STANDARD CONDITIONS OF CONTRACT pertaining to the supply of goods and services which can be viewed on the SANEDI Website at www.SANEDI.ORG.ZA
xv)	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.
xvi)	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 0725) 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

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Amount in Words

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Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date