



sanedi

South African National Energy
Development Institute

REQUEST FOR PROPOSALS FOR THE DEVELOPMENT AND IMPLEMENTATION OF AN ON-LINE MONITORING AND EVALUATION SYSTEM (MES) FOR PUBLIC SECTOR ENERGY EFFICIENCY PROJECTS.

Closing date: **8th July 2025**

Time: 11:00

Submission format: Electronic submission to 0924a.procurement@sanedi.org.za

Name of the respondent:.....

Late bids will not be accepted for consideration.

BID DETAILS

Bid Title	The Development and Implementation of an On-line Monitoring and Evaluation System (MES) for Public Sector Energy Efficiency Projects
Procurement Reference Number	0924a
Date of TENDER	24 June 2025
Compulsory Briefing Session	30th June 2025
Date of Tender CLOSING	8th July 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' 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

the SCM Department

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

The closing time for receipt of Proposals is at:

11h00 on the 8th July 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 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 • Technical Proposal & Methodology Statements • Specific Goals Declaration • Declaration of Interest • Certificate of Acceptance – General Conditions of Contract • Certificate of Attendance – Tender Clarification Meeting • Pricing Schedule / Schedule of Rates • Form of Tender 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 BID Clarification Meeting will happen on the 30th of June 2025 @12:00pm Below is the link Microsoft Teams Need help? Join the meeting now Meeting ID: 374 245 076 596 5 Passcode: S4Em6bJ7

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 0924a.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: 18th July 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. Scope Of Works/Technical Specifications

3.1 BACKGROUND

Improving energy efficiency is a strategic priority expressed in both the National Development Plan 2030 and South Africa's Nationally Determined Contribution (NDC) under the United Nations Framework Convention on Climate Change (UNFCCC). In South Africa, energy efficiency improves energy security, safeguards environmental sustainability and creates opportunity to increase competitiveness through a reduction of energy intensity. It also provides market and resulting job opportunities and can stimulate inclusive economic growth by releasing generation capacity to all citizens of South Africa. The accuracy, completeness, timeliness, regularity and relevance, as well as credibility, of data is important and therefore, assessing the quality of energy data requires thinking in terms of energy data management systems with components that need to be well managed to be effective.

Energy efficiency in the Public Building Sector forms part of the results framework proposed in the Post 2015 National Energy Efficiency Strategy (NEES) and is one of eight sectors that contribute towards the achievement of the overall impact of a reduction in final energy consumption by 2030. The policy measures for this sector specifically focuses on building an institutional energy efficiency culture and to substantially reduce the average specific energy consumption of the stock of buildings owned or rented by the public sector. The energy efficiency of new buildings will be driven through the successive tightening of building standards to improve energy performance. Funding the large-scale renovation of existing building stock requires innovative financing models and growth of the local Energy Service Company (ESCO) sector.

Energy efficiency of the Municipal Services Sector is another sector contributing towards the energy efficiency impact. The Energy Efficiency Demand-Side Management (EEDSM) programme established by the Department of Electricity and Energy (DEE), delivers grants to participating municipalities for energy efficiency measures. Municipalities identify measures that are feasible and bring about the greatest return, both in terms of energy savings and on investment, and to source funding through a variety of mechanisms instead of relying on the grant mechanism. In order for municipalities to develop energy management plans, business plans and financing proposals to source financing, municipalities have to demonstrate current consumption patterns and potential for savings.

A number of Provinces have initiated a range of energy efficiency programmes on their own buildings, ranging from small-scale CAPEX investments through to establishing energy performance contracts. The National Department for Public Works and Infrastructure (DPWI) has been implementing shared energy savings contracts with ESCOs for a number of years across its building portfolio.

Furthermore, an energy performance rating scheme for buildings has been rolled out, which requires the energy performance of certain categories and size of building to be assessed and certified through Energy Performance Certificates (EPCs). Signulu Document ID: 98B55B6658EDC3FAEED5977E564FB057 BSC- TERMS OF REFERENCE In responding to these challenges and opportunities, the then DMRE now DEE has established – the Energy Efficiency in Public Buildings and Infrastructure Programme (EEPBI) in collaboration with the South African National Energy Development Institute (SANEDI), the National Business Institute (NBI), and the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH, with additional funding from the Mitigation Action Facility. The objective of the EEPBI is to support public sector entities in developing and implementing large-scale energy efficiency projects using an energy performance contracting model, to leverage both technical expertise and finance from private sector Energy Service Companies (ESCOs).

3.2 Project Objectives

The overall aim of the TOR is to select and appoint a qualified service provider for the development and implementation of a reporting system for the effective monitoring, reporting and evaluation of public sector energy efficiency activities, in particular those developed under the Energy Efficiency in Public Buildings and Infrastructure Programme (EEPBP), the Municipal Energy Management Systems (MEMS), and the Energy Efficiency Demand Side Management (EEDSM) programme.

This document provides the detailed terms of this assignment, with the key deliverable being the final deployment of an internationally accepted, web-based M&E System (MES) to be hosted by the South African National Energy Development Institute (SANEDI) on behalf of EEPBP. The MES will enable the electronic web-based collection of data from data suppliers/sources and can collate (aggregate) the data for specified regions/spheres of government/technologies, perform data analysis functions and, transform data using known energy efficiency formulas, and generate reports. The MES is aimed at supporting the EEPBP in the monitoring, reporting and evaluation of public sector energy efficiency projects and programme activities and to improve reporting on the target outcomes.

Structure of Monitoring and Evaluation Framework:

A comprehensive M&E framework has been developed for public sector energy efficiency, which includes a set of indicators that, when measured, capture results on different levels of the Theory of Change (directly on output and outcome levels, and indirectly on impact level). The M&E framework and M&E plan contain various measurement items relating to each output or outcome on a vertical level and a generic structure horizontally including indicator, baseline data required, unit of data, targets, data collection methods for baselines and indicator (target) achievement, risks, assumptions, see diagram 1 below.

Figure 1 contains a diagram, based on the Theory of Change that specifies the hierarchy which would inform the required alignment for the internal design and structure of the system. Each of the hierarchical levels are numbered for the following levels. The diagram provides an example illustration of the structure for one outcome. The same generic structure is to be implemented for different outcomes, which allows for additions as the programme expands to other sectors.

Figure 2 illustrates how the system should provide for future inclusion of additional outputs, outcomes and activities.

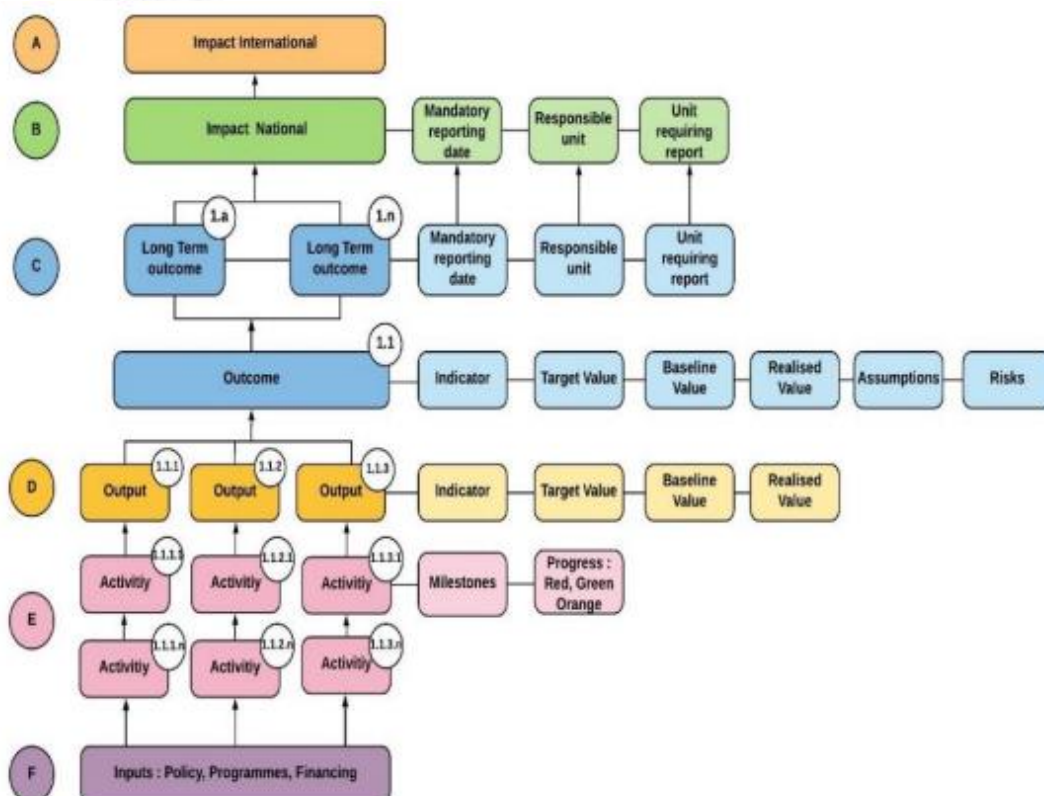


Figure 1 Illustration of the MES design based on the Theory of Change M&E

Impact	Indicator 1					
	Indicator 2					
	Indicator 3					
	Indicator 4					
Outcome	Indicator 1					
	Indicator 2					
	Indicator 3					
Outcome	Outcome 1	Output 1	Output 2	Output 3	Output 4	Output 5
	Outcome 2	Output 1	Output 2	Output 3	Output 4	Output 5
	Outcome 3	Output 1	Output 2	Output 3	Output 4	Output 5
	Outcome 4	Output 1	Output 2	Output 3	Output 4	Output 5
	Outcome 5	Output 1	Output 2	Output 3	Output 4	Output 5
	Outcome 6	Output 1	Output 2	Output 3	Output 4	Output 5
		Activity 1	Activity 1	Activity 1	Activity 1	Activity 1
		Activity 2	Activity 2	Activity 2	Activity 2	Activity 2
		Activity 3	Activity 3	Activity 3	Activity 3	Activity 3
		Activity 4	Activity 4	Activity 4	Activity 4	Activity 4
		Activity 5	Activity 5	Activity 5	Activity 5	Activity 5
	Sub-activities	5 subs	5 subs	5 subs	5 subs	5 subs

Figure 2 Illustration of number of placeholders within the system for different levels.

3.3. Scope of Works

3.3.1 Requirements for the MES tool

Is to design, customise, implement, and manage a Monitoring and Evaluation System based on proven framework and/or platform, tailored specifically to the needs of the EEPBIP programme. The software should be uniquely customised to meet SANEDI's operational and reporting needs. The scope of the assignment includes, but is not limited to:

- Identifying and recommending a base software framework that allows for customisation, scalability, and future enhancements tailored to EEPBIP needs. The system should have a track record of effective use for M&E purposes.

- Design a customised system architecture, data model that aligns with the EEPBIP's reporting indicators, workflows, and stakeholder landscape.
- Customising the system to meet the specific needs of the Public Sector Energy Efficiency projects, with an understanding that the full source code, system documentation, and all data masters will be handed over to SANEDI upon completion.
- Setting up data collection tools, indicators, and reporting templates.
- Enabling seamless import, parsing, and integration of data from multiple Excel workbooks and predefined PDF formats (such as utility bills or structured reports), with automated extraction of tabular data for accurate and efficient data processing within the M&E system.
- Providing training for relevant staff on the use of the software.
- Ensuring the system allows for both qualitative and quantitative data collection, analysis, and reporting.
- Integrating the M&E system with other project management tools if required.
- Ensuring user-friendly features for data input and analysis, including dashboards and automated reports.
- Data (tables, texts, files), as well as results displayed in the dashboards (data tables, figures, diagrams, graphic displays), should be exportable as screenshots and/or as diagrams or data (e.g. as CSV, PDF, or Excel format) for further processing in other software.
- Training shall be provided to relevant SANEDI personnel and other key stakeholders on the operation and implementation of the system, including security and access settings, the management of data, and inclusion of additional indicators. Clear and simple operating guidelines shall also be provided.

3.3.2 Technical Requirements

The successful service provider needs to ensure that SANEDI has full and unrestricted ownership of the source code. The Intellectual Property remains with SANEDI. The reporting MES must meet the following technical requirements:

- **System Architecture:**

- o Web-based applications are accessible via all standard web browsers.
- o Modular and scalable architecture to accommodate future enhancements, and allow integration of custom-built features, dashboards, and reporting modules specific to EEPBIP's M&E framework.
- o High availability and reliability with a minimum uptime of 99.5%.

- **Data Management:**

- o Support for structured and unstructured data.
- o Real-time data collection and processing.
- o Data validation and error-checking mechanisms.

- **Integration Capabilities:**

- o APIs for integration with existing energy management systems and databases.
- o Compatibility with various data formats (CSV, XML, JSON, etc.).
- o Real-time data synchronization.

- **User Interface:**

- o Intuitive and responsive user interface design.
- o Role-based access control with customizable user roles. Multilingual support, including English and local languages.

- **Reporting and Analytics:**

- o Customizable dashboards and visualizations.
- o Advanced analytics features, including trend analysis and predictive analytics.



- o Automated report generation and distribution.

- **Security:**

- o Compliance with industry-standard security protocols (e.g., SSL/TLS, encryption).
- o Regular security audits and vulnerability assessments.
- o Data backup and disaster recovery procedures.

- **Performance:**

- o High performance with minimal latency.
- o Scalability to handle increasing data volumes and user loads.
- o Efficient data retrieval and processing.

- **Support and Maintenance:**

- o Comprehensive technical support and maintenance services.
- o Regular software updates and patches. o User training programs and helpdesk support.

- **Skills Transfer:**

- o The service provider is required to conduct a comprehensive skills transfer to the internal SANEDI ICT team. This will ensure that SANEDI's ICT personnel acquire the necessary knowledge and skill set to maintain and support the system once the service provider's contract has expired.

- **Software Code Submission:**

- o The service provider is required to handover the complete, customized source code of the software developed under this contract to SANEDI (including modules developed for EEPBIP-specific functionality).
- o The submission shall include all necessary documentation, including but not limited to, installation guides, user manuals, and any other relevant materials to ensure the software can be effectively used and maintained by SANEDI.

- **Software Licensing**

- o the software system to be developed is custom-built for SANEDI under the EEPBIP programme and shall a such, the source code, system documentation, and associated assets shall be the property of SANEDI upon completion.
- o The service provider is required to deliver the system free from any third-party license dependencies unless such dependencies are open-source and/or otherwise declared and approved in advance.
- o The service provider shall not impose any licensing fees, renewal requirements, or access restrictions on SANEDI's use, modification, or redistribution of the software after the contract period.

- **License Transfer**

- o Upon delivery of the software and associated code, the service provider shall ensure that the software license is officially transferred to SANEDI, granting them Signulu Document ID: 98B55B6658EDC3FAEED5977E564FB057 BSC-TERMS OF REFERENCE full over the use and distribution of the software for the duration of the license period.
- o Upon handover, the service provider must ensure that the application is fully deployed on the SANEDI web server, is functioning correctly, and has been tested for performance and compatibility as part of the M&E TOR review process.
- o The service provider shall deliver the complete, clean, and fully documented source code to SANEDI no later than three (3) months before contract closure.
- o The system must be developed in such a way that it can be hosted, maintained, and extended by SANEDI or a third-party provider after the contract ends, without any further permissions, renewals, or proprietary limitations. o A comprehensive handover and capacity transfer plan must be implemented in the final project quarter, including:
 - Technical documentation and system architecture.
 - Administrator and user manuals.
 - Training for SANEDI personnel or its designated support providers.
 - A final "offboarding" workshop.

3.3.3 System Development Cycle Requirements

The system development cycle for a Monitoring and Evaluation (M&E) system typically follows a structured approach to ensure the system meets the needs of SANEDI, DEE stakeholders and effectively tracks and evaluates project

performance. Here are the main stages envisaged in the development cycle of an M&E system:

1. Needs Assessment and Requirement Analysis

- **Define Objectives:** Understand and articulate the primary goals and objectives of the M&E system.
- **Stakeholder Analysis:** Identify and engage key stakeholders to meet their requirements and expectations.
- **Data Requirements:** Determine what data needs to be collected, the sources of data, and how frequently data should be collected.
- **System Requirements:** Define the technical and functional requirements of the system, including software, hardware, and human resources.

2. System Design

- **Conceptual Design:** Develop a high-level design of the system, including the main components and their interactions.
 - **Detailed Design:** Create detailed specifications for each component of the system, including data models, user interfaces, and system architecture.
 - **Prototyping:** Develop prototypes to visualize and refine the design based on feedback from stakeholders.
- ### 3. Development and Testing
- **System Development:** Build the system based on the detailed design specifications. This involves coding, database creation, and integrating different components.
 - **Unit Testing:** Test individual components to ensure they function correctly.
 - **System Testing:** Test the entire system to ensure all components work together as intended.
 - **User Acceptance Testing (UAT):** Engage end-users to test the system in real-world scenarios and provide feedback for improvements.

3.4. Development and Testing

- **System Development:** Build the system based on the detailed design specifications. This involves coding, database creation, and integrating different components.
- **Unit Testing:** Test individual components to ensure they function correctly.
- **System Testing:** Test the entire system to ensure all components work together as intended.
- **User Acceptance Testing (UAT):** Engage end-users to test the system in real-world scenarios and provide feedback for improvements.

3.5. Implementation

- **Stakeholder assessment:** conduct a needs assessment with key stakeholders to define system requirements. All stakeholder engagement must be channeled through SANEDI to ensure proper project alignment.
- **Deployment:** Install the system in the live environment.
- **Data Migration:** Transfer existing data into the new system, if applicable.
- **Training:** Conduct training sessions for users to ensure they are comfortable using the new system.
- **Documentation:** Provide comprehensive documentation, including user manuals and technical guides.
- **Data Integrity:** ensure data integrity, system security, and compliance with relevant local and international data protection regulations including but not limited to POPIA and GDPR.
- **Implement:** implement the selected M&E system in phases, allowing for user feedback

and iterative improvements.

- Review: review and propose software options that have already proven their effectiveness in similar projects

Operation and Maintenance

- Monitoring: Continuously monitor the system to ensure it is functioning as expected within the maintenance period.
- Support: Provide ongoing support to users for any issues or challenges they encounter.
- Maintenance: Perform regular maintenance tasks, such as updates and bug fixes, to keep the system running smoothly until the end of the contract on 31 August 2026.

3.6. Evaluation and Improvement

- Performance Evaluation: Periodically evaluate the performance of the M&E system against predefined criteria.
- Feedback Collection: Gather feedback from users and stakeholders to identify areas for improvement.
- System Upgrades: Implement upgrades and enhancements based on evaluation results and feedback.

3.7 Deliverables

The successful service provider is expected to deliver the following:

- Detailed project plan with timelines and milestones.
- Fully functional reporting system in line with the system development cycle and requirements in subsections 3.4.1 and 3.4.2
- Integration with existing systems at SANEDI.
- User training sessions and training materials.
- Technical and user documentation and hand-over of source code.

3.8 Evaluation Methodology

Mandatory Requirements:

Please note that failure to adhere to the following requirements below will lead to immediate disqualification:

No.	Description	Yes	No
1	The bidder must commit to provide SANEDI with full and unrestricted ownership to the complete source code of the customised system upon handover and throughout the maintenance and support period.		
2	The M&E online system must be fully developed and operational within six (6) months. Bidders are required to submit a comprehensive work plan and implementation schedule that clearly outlines key activities, milestones, and timeframes to demonstrate their ability to meet this deadline.		
3	The service provider must offer post-implementation maintenance and support services until 31 August 2026, ensuring system stability, user assistance, and timely resolution of any technical issues during this period.		
4	The M&E online system, including all associated data and backups, must be hosted within the Republic of South Africa to ensure compliance with the Protection of Personal Information Act (POPIA) and relevant national data sovereignty regulations.		

3.6.1 The Minimum Required Score (Threshold) for functionality is 70 points out of 100 points. Bidders that score less than 70 points on functionality will be disqualified.

3.6.2 Project Cost

- The service provider(s) will be requested to provide a quote regarding the work to be undertaken for this project.
- The total cost must be VAT inclusive and should be quoted in South African currency (i.e. Rands).
- Detailed costing should be aligned with project activities and project deliverables.

3. Preference Points

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

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

1. GENERAL CONDITIONS

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

1.2 Preference Points applicable:

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

1.3 Points for this tender shall be awarded for:

(a) Price; and

(b) Specific Goals.

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

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

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

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

2. DEFINITIONS

- (a) “tender” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “price” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “rand value” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “tender for income-generating contracts” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “the Act” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).
- (f) “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (g) “B-BBEE status level of contributor” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (h) “bid” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (i) “Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (j) “EME” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (k) “functionality” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (l) “proof of B-BBEE status level of contributor” means:
 - B-BBEE Status level certificate issued by an authorized body or person;
 - A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - Any other requirement prescribed in terms of the B-BBEE Act;
 - “QSE” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

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

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

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

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4 Company registration number:.....

4.5 TYPE OF COMPANY/FIRM

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

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

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

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

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

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

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

Phase 2: Functionality Evaluation

- 1) Service providers' responses will be evaluated for functionality in this stage, based on achieving a minimum score of Seventy percent (60%).

The panel members will individually evaluate the responses received against the following criteria as set out below:

Table 1: Outline of Evaluation Criteria

Criteria	Scoring Guidelines (0 - 10)	Weighting
1. Reference Letters Bidders are requested to provide the following: Five (5) reference letters from clients, on official letterheads, confirming the successful implementation and maintenance of Monitoring and Evaluation/data based systems for Climate and Energy and/or similar projects. Each reference letter must include a project description, the implementation and maintenance period, and the contact details of the referee (including valid and contactable information). NB: The reference letters and projects must not be older than ten (10) years from the bid submission date and must be signed by the respective clients.	5 = References Letters 4 = References Letters 3 = References Letters 2 = References Letters 1 = Reference Letter 0 = Zero Submission	20%
2 Project Team Project Manager: Project manager with at least eight (8) years of experience in managing projects of similar scope and complexity. The experience should include system development, statistics or data analysis, monitoring & evaluation of energy or environmental (natural resources) projects; and should have led to 5	5 = Detailed CV with NQF Level 8 Qualifications and minimum 8 years' experience, in Project Manager role 4 = Detailed CV with NQF Level 8 Qualifications and minimum 7 years' experience, in Project Manager role 3 = Detailed CV with NQF Level 8 Qualifications and minimum 6 years' experience, in Project Manager role 2 = Detailed CV with NQF Level 7 Qualifications and a minimum of 4 years' experience, in Project Manager role	30%

successful projects that developed and implemented a data-based system or environmental monitoring system. Contact details for reference checks in line with the previous projects should be provided. The project manager will oversee the entire project lifecycle, ensuring timely delivery and compliance with requirements.	1 = Detailed CV with NQF Level 7 Qualifications and less than 3 years' experience, in Project Manager role	
System Analyst(s): A minimum of one (1) system analysts with at least eight (8) years of experience in analysing, designing, testing and implementing similar systems.	5 = Detailed CV with NQF Level 8 Qualifications and minimum 8 years' experience, in System Analyst/Tester role 4 = Detailed CV with NQF Level 7 Qualifications and minimum 7 years' experience, in System Analyst/Tester role 3 = Detailed CV with NQF Level 6 Qualifications with Two System Analyst Certificates and a minimum of 6 years' experience, in System Analyst/Tester role 2 = Detailed CV with NQF Level 6 Qualifications Two System Analyst Certificates and a minimum of 4 years' experience in System Analyst/Tester role. 1 = Detailed CV with NQF Level 6 Qualifications with Two System Analyst Certificate and not less than 3 years of experience, in System Analyst/Tester role	10%
Developers: A minimum of one (1) developer with at least eight (8) years of experience in system development, customization, and integration.	5 = Detailed CV with NQF Level 8 Qualifications with Two Developers Certificates and a minimum of 8 years' experience, in Developers role 4 = Detailed CV with NQF Level 7 Qualifications with Two Developers Certificates and minimum 7 years' experience, in Developers role 3 = Detailed CV with NQF Level 6 Qualifications with Two Developers Certificates and minimum 6 years' experience, in Developers role	5%

Database Administrator: A minimum of one (1) database administrator/developer with at least eight (8) years of experience in database management, optimization, and system integration. NB: SUBMISSION OF CV WITH NO ATTACHED COPY OF NQF LEVEL QUALIFICATION WILL RESULTS INTO ZERO POINT ALLOCATIONS	2 = Detailed CV with NQF Level 6 Qualifications Two Developers Certificates and a minimum of 4 years' experience in Developers role 1 = Detailed CV with NQF Level 6 Qualifications with One Developers Certificate and not less than 3 years' experience, in Developers role 5 = Detailed CV with NQF Level 8 Qualifications with SQL Certificate and minimum 8 years' experience, in database administrator role. 4 = Detailed CV with NQF Level 7 Qualifications with SQL Certificate 10 5 NB: SUBMISSION OF CV WITH NO ATTACHED COPY OF NQF LEVEL QUALIFICATION WILL RESULTS INTO ZERO POINT ALLOCATIONS and a minimum of 7 years' experience, in database administrator role. 3 = Detailed CV with NQF Level 6 Qualifications with SQL Certificate and minimum 6 years' experience, in Database administrator role. 2 = Detailed CV with NQF Level 6 Qualifications with SQL Certificate and a minimum of 4 years' experience in Database Administrator role.	10%
3. Project Proposal/Plan: A clear methodology for the development of a Monitoring and Evaluation online system must be indicated in the proposal. This plan should demonstrate how the proposed online M&E system will enable SANEDI to track performance indicators across this results chain, support data collection and reporting at all levels (input, activity to impact), and generate actionable insights aligned with the EEPBIP summary framework as per annexure 1 provided.	5= Clear methodology with deliverables, milestones, showing logical flow on how each task and performance indicators will be implemented 4 = Clear methodology with deliverables, milestones but no logical flow on how the task and performance indicators will be implemented 3 = Clear methodology with deliverables but no clear milestones, performance indicators and logical flow 2 = Methodology without deliverables and performance indicators milestones	50 25

The workplan must reflect an approach to delivering the customised M&E online system in line with SANEDI's scope of work and requirements as outlined in Section 3. Note: it should be noted that proposals that are unclear and not adhering to these instructions will forfeit "*****" points	1 = No methodology 5 = Detailed work plan that responds to ALL project scope of work and requirements. 4 = Detailed work plan that responds to MOST BUT NOT ALL project scope of work and requirements. 3 = Detailed work plan that responds to SOME project scope of work and requirements 2 = Detailed work plan that responds to VERY MINIMAL project scope of work and requirements 1 = No detailed work plan that responds to project scope of work and requirements.	25
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Threshold	70%
Total	100%

a. 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

5.2.2 Bidder's Declaration of Interest

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

YES/NO

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

Full Name	Identity Number	Name of State institution

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

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

2.2.1 If so, furnish particulars:

.....

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract?
YES/NO

2.3.1 If so, furnish particulars:

.....

.....

3 DECLARATION

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

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

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However,

communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

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

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

3.2 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.3 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

.....

Signature

Date

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

5.2.3 Certificate of Acceptance – General Conditions of Contract

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

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

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

b. Pricing Schedule

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

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

AMOUNT IN WORDS To be carried forward to Section 8 Form of Tender BID 0225 SIGNATURE OF BIDDER	
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I confirm that I am duly authorised to sign and certify that the price indicated on the schedule is our bid price submitted

NAME (PRINT) CAPACITY

SIGNATURE

NAME OF FIRM DATE

c. Form of Tender

1.	<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.
2.	<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.
3.	The service provider shall ensure that all its officers, employees, agents or subcontractors treat all information relating to the services as confidential.
4.	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.
5.	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.
6.	<u>Priced Proposal</u> The Bid is a <u>FIXED PRICE PROPOSAL</u> and clause 48 shall apply. Clause 49 is not applicable.
7.	<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

8.	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.
9.	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.
10	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.
11	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.
12	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.
13	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 0225 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.
14	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
15	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.
16	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 0225) as stated in South African Rand (ZAR) and upon the terms and conditions set out in the Bid Document free of exceptions, amendments or qualifications save those listed in Schedule 9 shall be:

Tender Amount

R

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Amount in Words

.....

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date