

TERMS OF REFERENCE

REQUEST FOR PROPOSALS FOR A STUDY OF CLEANER FOSSIL FUELS ROADMAP FOR SOUTH AFRICA (PHASE II)

Closing date: 26th September 2022

Time: 11:00

Submission format: Electronic submission to 0322.procurement@sanedi.org.za

Name of the respondent:.....

Late bids will not be accepted for consideration.

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BID DETAILS

Bid Title	Request for proposals for a study of Cleaner Fossil Fuels Roadmap for South Africa (Phase II)
Procurement Reference Number	0322
Description of Goods & Services	A study of Cleaner Fossil Fuels Roadmap for South Africa (Phase II)
Date of TENDER	05 th September 2022
Date of Compulsory Briefing Session	19th September 2022 @11:00
Date of Tender CLOSING	26 th September 2022 @11:00

CONTACT INFORMATION

Any enquiries regarding the bidding procedure may be directed to:

Ms Vulani Ngoveni

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

BIDDER'S DETAILS

NAME OF BIDDER

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER Code Number

CELL PHONE NUMBER Code Number

FACSIMILE NUMBER Code Number

E-MAIL ADDRESS

Signature of Bidder **Date**

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Submission Criteria

1. Notice and Invitation to submit Proposals

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

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

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

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

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

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

Ms Vulani Ngoveni

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

The closing time for receipt of Proposals is

11h00 on Monday the 26th September 2022

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2. Submission Data – Specific Conditions of Contract.

1.	<p>The Employer</p> <p>The Employer is SANEDI and is referred to as the CLIENT or EMPLOYER.</p>
2.	<p>Composition of Bid Document</p> <p>The Call for Proposals, the price quotation and the Enterprises responding submission documents forms part of a BID DOCUMENT and may be referred to such further herein.</p> <p>The documents associated with the calling for Proposals issued by the employer comprise:</p> <p>Submission Criteria</p> <ul style="list-style-type: none"> • Notice and Invitation to Submit a Quotation • Submission Data – Specific Conditions of Contract • Evaluation Criteria and Scoring • Tax Clearance Requirements • Central Supplier Database (CSD) summary report <p>Returnable Schedules</p> <ul style="list-style-type: none"> • Enterprise Questionnaire • Technical Proposal & Methodology Statements • Tax Clearance Certificate • B-BBEE Declaration • Declaration of Interest • Certificate of Past Procurement Performance • Certificate of Bid Independence • Certificate of Acceptance – General Conditions of Contract • Certificate of Acceptance – Bid Evaluation and Scoring Criteria • Certificate of Understanding – Scope of Works • Certificate of Attendance – Tender Clarification Meeting • Pricing Schedule / Schedule of Rates • Form of Tender • Schedule of Proposed Amendments and Qualifications • Record of Addenda or Errata to the Bid <p>Only respondents who submit fully completed Proposals incorporating all Returnable Schedules duly complete and signed will be eligible to have their submissions evaluated</p>
3.	<p>Bid Clarification Meeting</p> <p>A compulsory briefing meeting with representatives of the Employer will take place on the 19th September 2022 at 11:00am via Zoom. Bidders must RSVP by the 16th September 2022 at 12:00pm and further details of the bid clarification meeting will be sent to them. All RSVP's should be sent to enquiries.procurement@sanedi.org.za .</p> <p>No late RSVP'S will be considered.</p>

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<p>4.</p>	<p>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.</p> <p>The Submission E-Mail address designated is 0322.procurement@sanedi.org.za</p> <p>The Bidder shall ensure that the Bid Documents Returnable Schedules together with all Statutory Returns are duly completed, signed and scanned and uploaded to the designated E-mail address in a lock PDF format file. Documents transmitted in an editable format will be regarded as non-returns and may render the submission unresponsive. The size limits for SANEDI Email is 20 MB. Bidders may submit more than one E-mail.</p>
<p>5.</p>	<p>The closing time for submissions is as stated in the Notice and Invitation to Submit a Proposal Quotation, in the manner specified is</p> <p>Closing date: 26th September 2022 at 11h00</p>
<p>6.</p>	<p>Telephonic, telegraphic, telex, facsimile submissions offers will not be accepted.</p>
<p>7.</p>	<p>NO Late submissions, or submissions not deposited in the designated Tender Box will be considered, and it is incumbent on the Bidder to ensure that their submission together with all supporting documentation is in the designated Tender Box before the closing Time and date specified.</p>
<p>8.</p>	<p>The Bidder holds SANEDI harmless and indemnifies SANEDI in the event of any failure that prevents or delays the bid submission from being in the designated Tender Box/email address at the time of Bid Closure.</p> <p>Bidders are prohibited from using SANEDI Staff acting as their couriers, agents or delivery mediums to deposit bids in the tender box, and the bidder acknowledges that the use of SANEDI staff in this way will immediately disqualify their tender submission.</p> <p>It is the sole responsibility of the bidder to ensure that the documents submitted via PDF format are not corrupt and that any corrupt documents received by the closing date will be automatically excluded from being evaluated.</p>
<p>9.</p>	<p>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.</p> <p>Accept that the Employer shall not assume any responsibility for the misplacement or Premature opening of the tender offer if the Bid is not submitted in the required format and clearly marked with the bid reference and placed in the designated tender box before bid closing.</p>
<p>10.</p>	<p>SANEDI Reserves the RIGHTS to contract with suppliers who are BEE Compliant.</p>
<p>11.</p>	<p>SANEDI reserves the to rotate suppliers</p>
<p>12.</p>	<p>SANEDI reserves the right to independently verify Information that is submitted by the bidder.</p>
<p>13.</p>	<p>Bidders are prohibited and will be disqualified if they share resources amongst themselves for the same tender e.g. the proposed team member of company "A" is also a team member of company "B".</p>

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3. Scope of works/Technical specifications

3.1 BACKGROUND

The South African government has realised that a low carbon economy can bring benefits and particularly support climate change mitigation measures. The South African Government has already committed to reducing carbon emissions in line with specified targets for South Africa. As at 22 September 2021, the country's Nationally Determined Contribution (NDC) target range for 2025, has been updated from its original value of 398-614 Mt CO₂-eq, to a range of 398-510 Mt for 2025. Of greater significance is our 2030 mitigation target range which has been updated from 398-614 Mt CO₂-eq to a range of 350-420 Mt CO₂-eq. In order to meet these emissions reduction targets, several strategies will need to be used towards meeting this goal. A strategy that should be considered is the potential for a good business cleaner fossil fuel technologies implementing.

Reporting to the Department of Mineral Resources and Energy, the mandate of the South African National Energy Development Institute (SANEDI) is to serve as a catalyst for sustainable energy innovation, transformation and technology diffusion in support of South Africa's sustainable development. The Cleaner Fossil Fuels Programme at SANEDI housed the South African Centre of Carbon Capture and Storage (SACCCS), a national flagship programme of the National Climate Change Response Strategy White Paper. This Centre has since moved to the Council for Geoscience but remaining SANEDI tasks include this techno-economic business case study to address the Cleaner Fossil Fuels roadmap for South Africa and will be managed under the Renewables Programme.

South Africa's energy and climate change challenges are exacerbated by a reliance on Fossil Fuels for most of its primary energy supply. Approximately 90% of primary energy is derived from Fossil Fuels of which ~72% is coal. Moreover, coal provides ~85% of electricity generation capacity and ~92% of electricity production. Coal and gas are also used for the production of liquid fuels amounting to approximately 30% of the liquid fuels used in South Africa. This reliance on Fossil Fuels has led to ~440Mt CO₂ emissions per year.

South Africa's coal industry contributes significantly to employment opportunities, income generation as well as accounting for 6% of the country's total merchandised exports. South Africa also has a significant requirement for additional energy supply of electricity generation capacity as well as liquid fuel production. Furthermore, there are a multitude of other industries that contribute to national CO₂ emissions.

Notwithstanding South Africa's continually increasing implementation of clean energies and energy efficiency measures, Fossil Fuels are forecast to remain the major source of primary energy over the medium term.

SANEDI is well placed both nationally and internationally to pave the way towards a Cleaner Fossil Fuel future and has the support of global bodies in doing so. For example, SANEDI is already a partner in a number of the International Energy Agency's (IEA) specialised implementing agreements that inter alia share information and learning at a global level.

The outputs of this project would be to build upon the first phase of this roadmap (Published April 2022) that outlines the current fossil fuel energy scenario in South Africa, addressing inter alia technical

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feasibility, economic feasibility, advantages and disadvantages mapping a move towards Cleaner Fossil Fuels. This next phase of the study shall comprise engagements with interested and affected parties and make motivated streamlined recommendations for which Cleaner Fossil Fuel systems and/or demonstrations would need to be executed by South Africa.

3.2 PROJECT OBJECTIVES

The aim of this project is to:

- a) Build on the review of the current South African Fossil Fuel sector status, encompassing future plans, and produce a concise readable document that showcases a feasible techno-economic business case for Cleaner Fossil Fuel technologies in the country. This should be in alignment with most recent announcements by the State President on energy plans to address supply and demand issues in the short to medium term.
- b) To produce a motivated recommendation and second phase of the roadmap for technological and financial interventions that would be most suited to implementation of such technologies in South Africa (this should include an easily interpretable infographic).

3.3 SCOPE OF WORKS

The scope of work for this project will seek to generate a concise, reader friendly document that utilizes the first phase as an assessment and appraisal of fossil fuel technologies in South Africa and their suitability for migration towards Cleaner Fossil Fuels. Taking into account most recent announcements by the State President on energy plans to address supply and demand issues in the short to medium term. The scope includes the electricity and liquid fuel sectors and should include, but not be limited to, the following topics:

- 3.3.1** Determine which existing FF chains in SA can implement cleaner fossil fuel technologies and/or replace a component/portion of this value chain, based on more immediately implementable solutions.
This evaluation should consider, but not be limited to, clean coal, renewable energy hybridisation, emissions abatement technologies, cleaner generation technologies, energy efficiency implementation in Fossil Fuel electricity and liquid fuel generation.
- 3.3.2** Focal technologies should be assessed for immediate and cost-effective integration into existing Fossil Fuel value chains and what would be required in order to achieve this from a techno-economic perspective.
Any other technologies/interventions that are considered important for inclusion by the consultant should include, but not be limited to, a description of the technology and economic feasibility as well as their suitability for introduction to South Africa. This should not simply be a scan of available literature; the consultant should provide an assessment of how these technologies would be implemented within the South African energy system.
- 3.3.3** The techno-economic review for this short to medium term roadmap may include:
 - * User case studies
 - * Quantification of economic and technically feasible displacement of Fossil Fuels through these interventions
 - * What level of technology penetration would be needed to make a significant difference by the implementation of Cleaner Fossil Fuels in South Africa

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3.3.4 Based on the above short to medium term recommendations this report should:

- * Showcase success factors, hurdles/challenges, economics
- * Outline a feasible implementation plan
- * Draw parallels with global projects that have been tested and/or terminated and why?

3.3.5 Administration, the Contractor shall:

- * Record written minutes of each Project Steering Committee (PSC) (minimum of 3)
- * Circulate all minutes within 5 working days of the meeting
- * Produce Progress Reports to be addressed at progress meetings

Payments will be made by SANEDI after acceptance by SANEDI of a Progress/Final Report and receipt of an itemised invoice and statement

COMPULSORY BRIEFING

A compulsory virtual briefing will take place at **11:00am on 19th September 2022**. Details of this briefing will be shared with interested bidders on receipt of their RSVP to SANEDI Procurement, one hour before the briefing commences.

DELIVERABLES

- * Interactions with targeted stakeholders
- * Minutes of meetings with the PSC (synthesis report)
- * Draft report and infographic, for inputs from the PSC and other stakeholders deemed relevant/necessary
- * Final report containing the completed study and including:
 - o Summary of findings
 - o Details (all raw data and information received/gleaned)
 - o Engagement report, including recommendations
 - o Motivated recommendations for best suited user cases in South Africa
- * Two (2) electronic copies (editable Word version and PDF print layout) and a PowerPoint summary presentation of the report

GOVERNANCE

Overall project governance will be managed by the SANEDI. The project shall be guided and reviewed by a Project Steering Committee, composed of members including:

- * A representative from the Renewable programme of SANEDI and/or alternate
- * Up to 3 representatives from the SANEDI identified stakeholder pool
- * Other persons may be invited by SANEDI as and when deemed appropriate
- * SANEDI shall chair the progress meetings
- * The consultant will be expected to produce minutes and action items from all meetings within 1 calendar week of the meeting
- * At least 3 meetings are deemed necessary, but more may be included, an inception meeting, a progress meeting and a final closure meeting after completed report submission, attended by the Project Steering Committee and any other person deemed relevant by SANEDI.

The acceptance of the Final Report shall be in accordance with the following procedures:

- * Review by SANEDI
- * External review if deemed appropriate by SANEDI

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- * Amendments being effected as recommended during the evaluation
- * Consideration and recommendation by the PSC

3.4 PROJECT DURATION

SANEDI requires a completed roadmap document by **28 February 2023**. This will be governed under the above administration and should include a payment schedule on deliverables of no less than 2 payments. Any deviations from this will need to be motivated in writing and approved by SANEDI. The project plan shall include a table outlining timeframes, enabling deliverables and costs as well as a schedule of each person's time and task allocation. Final payment will take place after approval of the final report.

4 Evaluation Criteria

The bids received will be evaluated in two stages. The first stage will be the technical evaluation, the second the financial/BEE evaluation. The following are the evaluation criteria that all bids will be assessed against.

1.	Criteria	Scoring Guidelines (1-10)	Weighting
	<p><i>Qualification capability and experience of key staff:</i></p> <p><i>Curriculum vitae</i> of key staff working on the project:</p> <ul style="list-style-type: none"> • Experience/understanding of key staff in energy economy and technology • Academic qualifications (minimum at bachelors level) of team in science, engineering and economics • Tangible experience in the field in the form of reports and publications 	<p>1 – 5 = little to no relevant qualifications or experience in the fossil fuel and clean energy sector of any staff</p> <p>5 – 7 = some relevant qualifications and experience in the fossil fuel and clean energy sector across the proposed team key</p> <p>7 – 10 = extensive relevant qualifications and experience in the fossil fuel and clean energy sector across the proposed team</p>	<u>25%</u>
	<p><i>Capacity, capability and experience of organisation(s):</i></p> <p>Description of company profile, company history including years in the relevant business (minimum 5 years), description of project team including roles, list of previous work including studies, published papers, etc. (electronic links to these previous bodies of work would be advantageous)</p>	<p>1 – 5 = little to no relevant capacity, capabilities and experience within the organisation with little to no evidence of previous relevant work in the fossil fuel and clean energy sector</p> <p>5 – 7 = some relevant capacity, capabilities and experience with some evidence of previous relevant work in the fossil fuel and clean energy sector</p>	<u>25%</u>

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		7 – 10 = extensive relevant capacity, capabilities and experience within the organisation with extensive evidence of previous relevant in the fossil fuel and clean energy sector									
	<p>References Letters:</p> <p>Service provider/s must have at least had five (5) years in energy industry in the key areas listed in the scope of works which must be demonstrated or supported by five (5) reference letters (in the client’s letterhead and duly signed).</p>	<p>5 reference letters in the relevant field listed in the scope of works=10</p> <p>3 reference letters in the relevant field listed in the scope of works =5</p> <p>1 reference letter= 1</p>	<u>10%</u>								
	<p>Methodology of the Study:</p> <p>Detailed methodology of the work to be undertaken (clear project plan with project timelines and milestones) – not merely a repetition of the “Scope of Work” as detailed in above</p>	<p>1 – 5 = basic repetition of the “Scope of Work”</p> <p>5 – 7 = outline of methodology</p> <p>7 – 10 = detailed methodology that includes other factors, not directly addressed above, but deemed necessary for the study</p>	<u>40%</u>								
	Threshold		80%								
	Total		100%								
2.	<p>The Bid will be evaluated on 80/20 Preferential Point System according to the Preferential Procurement Policy Framework Act,2000</p> <p>The points scored out of 80 should be calculated according to the following formula:</p> <p style="margin-left: 40px;">(i) The 80/20 preference point system</p> $Ps = 80 \left(1 - \frac{Hs - Rs}{Rs} \right)$ <p style="margin-left: 40px;">where</p> <p>Ps = points scored for functionality and price of the bid/proposal under consideration</p> <p>Hs = highest percentage scored by any acceptable bidder for functionality and price</p> <p>Rs = percentage scored for functionality and price by bid/proposal under consideration</p>										
3.	<p>The maximum score for this bid shall be awarded as follows:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">POINTS</th> <th style="text-align: left;">PRICE</th> </tr> </thead> <tbody> <tr> <td>BBBEE Status level of Contribution</td> <td>20</td> </tr> <tr> <td>Points for price</td> <td>80</td> </tr> <tr> <td>Total points for price and BBBEE do not exceed</td> <td>100</td> </tr> </tbody> </table>			POINTS	PRICE	BBBEE Status level of Contribution	20	Points for price	80	Total points for price and BBBEE do not exceed	100
POINTS	PRICE										
BBBEE Status level of Contribution	20										
Points for price	80										
Total points for price and BBBEE do not exceed	100										

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5 Tax Clearance Requirements

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

6 Returnable Schedules

6.1 Enterprise Questionnaire

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

Detailed documentation must be attached to this section under sub clauses 6.1.1 – 6.1.4 to provide substantive returns

6.1.1 Company Profile

The following particulars must be furnished. In the case of a joint venture, separate enterprise questionnaires in respect of each partner must be completed and submitted.
Section 1: Name of enterprise:
Section 2: VAT registration number, if any:

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Section 3: CIDB registration number, if any:			
Section 4: Particulars of sole proprietors and partners in partnerships			
Name*	Identity number*	Personal income tax number*	
* Complete only if sole proprietor or partnership and attach separate page if more than 3 partners			
Section 5: Particulars of companies and close corporations			
Company registration number			
Close corporation number			
Tax reference number			
Section 6: Record in the service of the state			
Indicate by marking the relevant boxes with a cross, if any sole proprietor, partner in a partnership or director, manager, principal shareholder or stakeholder in a company or close corporation is currently or has been within the last 12 months in the service of any of the following:			
<input type="checkbox"/> a member of any municipal council <input type="checkbox"/> a member of any provincial legislature <input type="checkbox"/> a member of the National Assembly or the National Council of Province <input type="checkbox"/> a member of the board of directors of any municipal entity <input type="checkbox"/> an official of any municipality or municipal entity		<input type="checkbox"/> an employee of any provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act 1 of 1999) <input type="checkbox"/> a member of an accounting authority of any national or provincial public entity <input type="checkbox"/> an employee of Parliament or a provincial legislature	
If any of the above boxes are marked, disclose the following:			
Name of sole proprietor, partner, director, manager, principal shareholder or stakeholder	Name of institution, public office, board or organ of state and position held	Status of service (tick appropriate column)	
		Current	Within last 12 months

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*insert separate page if necessary			
<p>Section 7: Record of spouses, children and parents in the service of the state</p> <p>Indicate by marking the relevant boxes with a cross, if any spouse, child or parent of a sole proprietor, partner in a partnership or director, manager, principal shareholder or stakeholder in a company or close corporation is currently or has been within the last 12 months been in the service of any of the following:</p>			
*insert separate page if necessary			
<p>The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise:</p> <p>i) authorizes the Employer to obtain a tax clearance certificate from the South African Revenue Services that my / our tax matters are in order;</p>			

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

6.1.2 Bidders Experience Profile

The experience of the tenderer or joint venture partners in the case of an unincorporated joint venture or consortium as opposed to the key staff members / experts in similar projects or similar areas and conditions in relation to the scope of work over the last five years will be evaluated.

Tenderers should very briefly describe his or her experience in this regard and attach this to this schedule.

The description should be put in tabular form with the following headings:

Description of work (service)	Value of work (i.e. the service provided) inclusive of VAT (Rand)	Date completed

6.1.3 Key Personnel

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

The experience of assigned staff member in relation to the scope of work will be evaluated from three different points of view:

- 1) General experience (total duration of professional activity), level of education and training and positions held of each discipline specific team leader.
- 2) The education, training, skills and experience of the Assigned Staff in the specific sector, field, subject, etc which is directly linked to the scope of work.
- 3) The key staff members' / experts' knowledge of issues which the tenderer considers pertinent to the project e.g. local conditions, affected communities, legislation, techniques etc.

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A CV of the Project Director and Team Leader of not more than 2 pages should be attached to this schedule, together with the Bidders organization and staffing demographics

DECLARATION OF BIDDER – ENTERPRISE QUESTIONNAIRE

The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that the contents of the sections 5.1.1 – 5.1.3 schedule are within my personal knowledge and are to the best of my belief both true and correct.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

6.2 Technical Proposal & Methodology Statement

6.2.1 Solution Statement

The **Solution Statement and Methodology** must respond to the scope of work and outline the proposed technical solution offered. This technical solution statement should articulate what value add the tenderer will provide in achieving the stated objectives for the project and detail the time frames and proposed methodology. Vulture

The layout of the solution statement and Methodology should be such that it mirrors the headings contained in the Scope of Works, Section 6 of this Bid Document.

The tenderer must as such explain his / her understanding of the objectives of the assignment and the Employer's stated and implied requirements, highlight the issues of importance, and explain the technical approach they would adopt to address them. The document should explain the technical attributes and contain specifications of all equipment proposed, to demonstrate the compatibility and capability of the solution. The technical paper should also include a quality plan which outlines processes, procedures for the testing and verification of deliverables, and meet the requirements and indicate how risks will be managed and what contribution can be made regarding value management. The Methodology statement must also include an activity Gantt reflecting a work breakdown structure.

DECLARATION OF BIDDER – TECHNICAL PROPOSAL AND METHODOLOGY STATEMENTS

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The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that the contents of the sections 5.2 schedule is within my personal knowledge and is to the best of my belief both true and correct.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

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6.3 Tax Clearance Certificate

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

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6.4 B-BBEE Bid Declaration

BEE Terms and Conditions

If it is detected that false information regarding the B-BBEE status level of contribution, local production content, or any other matter which will affect or has affected the evaluation of the tender, or where the tender has failed to declare any subcontracting arrangements, the purchaser may, in addition to any other remedy it may have –

- (a) disqualify the person from the bidding process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favorable arrangements due to such cancellation;
- (d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution

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

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

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

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

TERMS OF REFERENCE

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

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6.5 Bidder's Declaration of Interest

	<p>Any legal person, including persons employed by the state, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favoritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where</p> <ul style="list-style-type: none"> - the bidder is employed by the state; and/or - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
	<p>In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.</p>

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

DECLARATIONS	YES	NO
Are you or any person connected with the bidder presently employed by the state?		
If so, furnish the following particulars: Name of person / director / trustee / shareholder/ member		
Name of state institution at which you or the person connected to the bidder is employed :		
Position occupied in the state institution		
Any other particulars:		
If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?		
If yes, did you attach proof of such authority to the bid document? <u>(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.</u>		
If no, furnish reasons for non-submission of such proof:		

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	Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?		
	If so, furnish particulars:		
	Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?		
	If so, furnish particulars:		
	Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies Wither or not they are bidding for this contract?		
	If so, furnish particulars:		

Full details of directors / trustees / members / shareholders.

The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in the table below.

Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number / Persal Number

"State" means –

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- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

DECLARATION OF INTEREST

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

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

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

TERMS OF REFERENCE

6.6 Declaration of Bidder's Past Supply Chain Management Practices

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

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	<p>Yes</p> <input type="checkbox"/>	<p>No</p> <input type="checkbox"/>
4.1.1	If so, furnish particulars:		

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

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SBD 8

CERTIFICATION

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

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

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

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

TERMS OF REFERENCE

6.7 Certificate of Independent Bid Determination

I, the undersigned, in submitting the accompanying bid for

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

I therefore certify, on behalf of

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

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

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7. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
8. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
9. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

6.8 Certificate of Acceptance – General Conditions of Contract

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

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

Name of Enterprise Bidding:

Name of Authorised Representative

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Signature of Authorised Bidder

Date

6.9 Declaration of Acceptance – Bid Evaluation Criteria

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

Warrant that I am duly authorised to represent our company in the submission of this Bid and we acknowledge that we are fully conversant with, and accept the Bid Evaluation, Scoring and Adjudication Criteria as contained in the Special Conditions of the Bid together with the General conditions as contained on the SANEDI web site, and acknowledge that we have read, understand and accept such as the methodology of bid evaluation and adjudication for this bid.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

6.10 Declaration of Understanding – Scope of Works

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

Warrant that I am duly authorised to represent our company in the submission of this Bid and we acknowledge that we are fully conversant with the scope of works and technical specifications and all requirements enabling us to submit a proposal.

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

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7 Pricing Schedule

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

SANEDI PROCUREMENT

TERMS OF REFERENCE

<p>AMOUNT IN WORDS To be carried forward to Section 8 Form of Tender BID 0322</p> <p>..... SIGNATURE OF BIDDER</p>	
--	--

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

8 Form of Tender

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12.	<p><u>Conditions of Acceptance</u></p> <ul style="list-style-type: none"> ▪ The Tenderer is required to complete this FORM of TENDER in every respect, and tenders will not be considered unless this FORM of TENDER is completed in every particular and each page is initialled by the tenderer and fully signed on this page. ▪ This Form of Tender shall be completed by the tenderer in black ink and no corrections, use of correcting fluids or any alterations will be permitted. ▪ The FORM of TENDER and price schedules shall be stated in South African Rand (ZAR) and the price indicated on the schedules shall be binding on the tenderer, and no exception shall be made for omissions, casting errors or errors of whatsoever nature. ▪ Where a tenderer is not returning a price for a line item, or costs associated with that line item are included in another line item, the tendered shall endorse that line item with the words, “No Cost” or “incorporated in Item (NO.....)” whichever being applicable.
13.	<p><u>Confidentiality</u></p> <p>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.</p>
14.	<p>The service provider shall ensure that all its officers, employees, agents or subcontractors treat all information relating to the services as confidential.</p>
15.	<p>The service provider shall ensure that proper security procedures are implemented and maintained to restrict, as far as possible, access to confidential information. The service provider shall ensure that no confidential information is copied or reproduced without prior written approval by the Accounting Officer.</p>
16.	<p>Failure by the service provider to comply with the provisions of this Clause shall constitute a material breach of the contract and shall constitute a ground for termination of the contract by SANEDI, by giving the service provider thirty days’ notice.</p>
17.	<p><u>Priced Proposal</u></p>
18.	<p>FIXED PRICE PROPOSAL</p> <p>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</p>
19.	<p>The Bidder is advised that SANEDI will remit the appointed service provider directly and shall be required to comply with all remittance requirements stipulated in the Conditions of Contract specific to this appointment.</p>
20.	<p>The Bidder is advised to plan and provide for all possible risks that may affect the delivery project on time and what mechanisms are in place to manage such risks.</p>

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21.	We/I the undersigned, who warrants that they are duly authorised to do so on behalf of the enterprise, confirms that the contents of the conditions of acceptance pertaining to the FORM of TENDER are acceptable, and having fully understood the scope of works and conditions of bidding, herewith warrant that We/I have satisfied ourselves as to the correctness and sufficiency of the rates and prices set out in the Schedule and therefore offer the following PRICE and offer to undertake the works in accordance with the standards and specifications required.
22.	The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that this Form of Tender is submitted in good faith, free of corrections, alterations or encumbrances and such price is binding on the enterprise for a period of 90 days from date of tender close and may be extended by mutual agreement between the parties for a further period of 90 days thereafter.
23.	We/I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
24.	We/I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to SANEDI in accordance with the requirements and specifications stipulated in bid number 0322 at the price/s quoted. This offer remains binding and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid.
25.	We/I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents in accordance with the SANEDI STANDARD CONDITIONS OF CONTRACT pertaining to the supply of goods and services. The Bidder is advised to familiarise themselves with the SANEDI STANDARD CONDITIONS OF CONTRACT pertaining to the supply of goods and services which can be viewed on the SANEDI Website at www.SANEDI.ORG.ZA
26.	We/I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfilment of this contract.
27.	We/I declare that we/I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
28.	This Clause is intentionally left blank

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 0322) as stated in South African Rand (ZAR) and upon the terms and conditions set out in the Bid Document free of exceptions, amendments or qualifications save those listed in Schedule 9 shall be:

SANEDI PROCUREMENT

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Tender Amount

R

Amount in Words

.....

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

TERMS OF REFERENCE

9 ADDENDA

9.1 Proposed Amendments and Qualifications

29.	<p>The Tenderer should record any deviations or qualifications they may wish to make to the tender documents in this Returnable Schedule.</p> <p>If the space provided is insufficient, the Tenderer must reflect the headings and emphasis of matter in this schedule and provide detailed amplification of such deviations and qualifications in a separate sheet and incorporate such response in the singular bound bid document submitted at the time of Tender.</p> <p>The Tenderer accepts that the Client will, at its sole discretion determine the validity of such amendments and or qualifications and apportion weighting to such in addition to the BID SCOPE or evaluation criteria in the best interest of the Client.</p> <p>The decision of the Client in this regard is final, and the Client reserves the right to negotiate with a bidder to finalise the implications of such amendments and qualifications</p> <p>Tenderers must not include deviations or qualifications relating to the scope of work in this schedule where they are required to submit an Approach Paper.</p>						
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%; padding: 5px;">Page</th> <th style="width: 30%; padding: 5px;">Clause or item</th> <th style="width: 55%; padding: 5px;">Proposal</th> </tr> </thead> <tbody> <tr> <td style="height: 150px;"></td> <td></td> <td></td> </tr> </tbody> </table>		Page	Clause or item	Proposal			
Page	Clause or item	Proposal					

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

TERMS OF REFERENCE

11.2 Record of Addenda to Tender Documents

We confirm that the following communications received from the CLIENT before the submission of this tender offer, amending the tender documents, have been taken into account in this tender offer:

	Date	Title or Details
1.		
2.		
3.		
4.		
5.		

Name of Enterprise Bidding:

Name of Authorised Representative

Signature of Authorised Bidder

Date

