sanedi

South African National Energy Development Institute.

REQUEST FOR QUOTATION

FOR

GRAP TECHNICAL REVIEW OF ANNUAL FINANCIAL STATEMENTS

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 ……

RFQ Number	RFQ2425
Date of RFQ	01 July 2025
SANEDI Contact	All enquiries and RFQ submissions must be directed to : Name: SCM Department Tel: 011 038 4348 Enquiries: e-mail address: enquiries.procurement@sanedi.org.za Website address: www.sanedi.org.za
Closing date & Time Electronic - Submission	**Thursday the 10th of July 2025 at 11:00am** **E-mail submission only: quotes.procurement@sanedi.org.za**
Work specification (and Technical specifications)	**1. Project Objective** The South African National Energy Development Institute (SANEDI) is a state-owned entity established under the National Energy Act (Act No. 34 of 2008). The Act provides for SANEDI to direct, monitor and conduct energy research and development, promote energy research and technology innovation, as well as undertake measures to promote energy efficiency throughout the economy. Section 40 of the Public Finance Management Act (PFMA) (Act 1 of 1999) requires Accounting Officers of Constitutional institutions to prepare and submit Annual Financial Statements (AFS) and Annual Reports to the National Treasury, the Auditor- General of South Africa (AGSA) and the Executive Authority. In terms of Section 40(1)(c) of the PFMA, financial statements submitted to the AGSA and National Treasury must be complete and accurate. Failure to submit accurate AFS constitutes non-compliance with the PFMA and may be seen as an act of financial misconduct in terms of sections 81 and 83 of the PFMA. SANEDI prepares annual financial statements for the period ending 31 March each year for submission to National Treasury and the Auditor General by 31 May. The annual financial statements are prepared on an accrual basis of accounting and are in accordance with historical cost convention unless otherwise specified. A summary of the significant accounting policies, which have been consistently applied, except where an exemption or transitional provision has been granted, are disclosed in the financial statements. The annual financial statements are prepared in accordance with the effective Standards of GRAP, including any interpretations and directives issued by the Accounting Practices Board and encompass the reporting as specified in the PFMA. **2. Project Objectives**

	The purpose of this bid is to request a quotations from suitable qualified service providers to provide technical review of the annual financial statements annually and technical assistance as and when required for SANEDI for a period of three financial years (2024/2025 – 2026/2027).
Scope of Works	**3. Scope of work** A competent successful service provider and/or independent consultants should be experienced in delivering the following: 3.1.1 Review the Annual Financial Statements for validity, accuracy and completeness and ensure preparation in accordance with Standards of Generally Recognized Accounting Practice (GRAP) including any interpretations, guidelines and directives issued by the Accounting Standards Board. 3.1.2 Review relevance of accounting policies to draft Annual Financial Statements and disclosure notes. 3.1.3 Provide technical opinion on the disclosure of some items on the annual financial statements. 3.1.4 Assist with GRAP technical review and responses to audit findings raised by the Auditor General. 3.1.7 Provide SANEDI with a GRAP disclosure checklist as supporting documentation. 3.1.8 Present the status report to SANEDI Management whenever required; The following deliverables are expected from the service provider: 1. Technical report on review of annual financial statements; 2. Customized GRAP AFS Review checklist – prepared by the service provider. 3. The report and presentation must be presented to SANEDI management. **4. Project duration** The contract is expected to run for three years, commencing on the date of signing the Service Agreement. SANEDI reserves the right to terminate the service level agreement should the service provider's performance fail to meet the agreed service levels. SANEDI reserves the right to appoint any one or more services provider(s) at its sole discretion as it may deem fit for the required services to be rendered effectively and successfully. SANEDI reserves the right to appoint no service provider as a result of the request for quotation (RFQ) process.
Required qualifications and experience (Technical Evaluation Criteria)	Evaluation Criteria The Bid will be evaluated technically on a two-stage basis. The first stage is a mandatory eligibility criterion, and the second stage is the technical evaluation of the skills, experience, and capacity of the service provider. There are no points calculated for the eligibility criteria; however, failure to meet the criteria will result in immediate disqualification of the bidder. **Stage 1: Pre-Qualification Criteria** 5.1 Bidders must attach relevant certified copies of the highest Qualifications and professional certificate registration. Certification may not be older than 6 months prior to submission.

• Engagement Lead: Postgraduate degree in the Commerce faculty , professional certificate registration: SAICA
• Senior Consultant: Postgraduate degree in the Commerce faculty, professional certificate registration: SAICA/SAIPA/ACCA/CIMA etc.
• Junior Consultant: Bachelor's degree in accounting, professional certificate registration: SAICA/SAIPA/ACCA/CIMA/IRBA

Uncertified qualification/professional certificates will not be accepted as authentic. Foreign qualifications are required to be accompanied by a SAQA evaluation certificate.

5.2 In case of a Joint Venture, a written agreement between the parties which must clearly set out the roles and responsibilities of each member and include a resolution of each company of the Joint Venture together with a resolution by its members authorizing a member of the Joint Venture to sign the documents on behalf of the Joint Venture.

Stage 2: Technical/Functionality Stage An assessment of functionality will be based on the evaluation criteria noted in the table below. Each of the evaluation criteria in the table will carry a weighting as indicated, and the bidder will be required to score a minimum of 75 points (out of the 100 points), i.e., 75%, for Functionality to qualify and proceed to Stage 3 of the evaluation based on price and specific goals. The service provider is to meet the below criteria which is applicable to the bid to be submitted to the SANEDI.

Criteria	Scoring Guideline (1-10)	Weighting
Company Experience: A company profile clearly indicating the number of years in providing Quality review functions and the clients serviced must be submitted as evidence. • Minimum 3 years' experience in the Quality Review of GRAP AFS.	• Company has less than 3 years' experience = 3 points • Has 3 – 5 years' experience – 7 points • Has more than 5 years = 10 points	**20%**
Contactable client references – where similar services were rendered: Bidder must submit relevant reference letters from different clients as evidence of related quality review of financial statements successfully completed. **NB:** The Reference Letter(s) must not be older than 5 years must be on the letterhead of the previously serviced	3 valid letters attached = 15 points 2 valid letters attached = 10 points 1 letter attached = 5 points. No valid letter attached = 0 points	**30%**

	client and should reflect at least the name of the client, title of the related work conducted, year conducted and completed, contactable reference name and contact details and signed by the appropriate delegate. The Reference Letter must indicate the quality of the service rendered.		
	Relevant experience: Bidders must attach the detailed CVs of the proposed core team	Experience of Engagement Lead A minimum of 10 years (post articles) GRAP experience and provision of GRAP technical opinions = 15 points Experience of a Senior Consultant A minimum of 8 years' (post articles) GRAP experience and provision of GRAP technical opinions = 10 points Experience of a Junior Consultant: A minimum of 5 years' experience in quality review of annual financial statements = 5 points	**20%**
	Project plan and methodology: A detailed methodology including the following areas: 1. Demonstrating experience in review of GRAP financial statements of public sector entities. 2. Clearly define method of how the scope will be executed. 3. Resources including budget and resources to be deployed.	Comprehensive methodology is aligned to the scope of work =10 points. Reasonable methodology outlining one or two key focal areas and analysis = 7 points Poor methodology failing to outline any focal areas and analysis = 3 points.	**20%**
	Technical Threshold		**75%**
	Total		**100%**

	Total points available 100 = **Minimum threshold 75 points**
Terms and Conditions	The RFQ shall be subjected to the SANEDI procurement terms and conditions which can be found on www.sanedi.org.za . New suppliers are requested to apply for registration as suppliers on the database as no RFQs will be considered without suppliers firstly being registered on the supplier database.
Quoted Price excluding Disbursements VAT inclusive	(Attach a formal quotation on company official letterhead to this RFQ) R
Discounted amounts Disbursements VAT inclusive	R
	R
Total Amount VAT inclusive	R
Other Requirements	The supplier must submit the following returnable schedules: 1. Pricing schedule 2. Attach SBD 4 and SBD 6.1 3. Attach valid tax clearance 4. Certified BBBEE certificate Forms are available on www.sanedi.org.za

SBD 4: 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.

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

3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting

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.

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

…… ……

Position Name of bidder

1. 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:

80/20 or **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \quad \text{or} \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = 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 preferencepoint 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.

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SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: .....

DATE: .....

ADDRESS: .....

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