



**sanedi**

South African National Energy  
Development Institute

# **REQUEST FOR PROPOSALS FOR APPOINTMENT OF A TRANSACTION ADVISOR TO DEVELOP THE ELECTRIC MOBILITY PROJECT IN SOUTH AFRICA**

Closing date: **02 May 2025**

Time: 11:00

Submission format: Electronic submission to [2224.procurement@sanedi.org.za](mailto:2224.procurement@sanedi.org.za)

Name of the respondent:.....

Late bids will not be accepted for consideration.

## BID DETAILS

Bid Title	Request for proposal for Appointment Of A Transaction Advisor To Develop The Electric Mobility Project In South Africa
Procurement Reference Number	<b>2224</b>
Date of TENDER	<b>01 April 2025</b>
Date of Compulsory Briefing Session	<b>15 April 2025 at 11:00am</b>
Date of Tender CLOSING	<b>02 May 2025 at 11:00am</b>

## 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](mailto:enquiries.procurement@sanedi.org.za)

## BIDDER'S DETAILS

NAME OF BIDDER .....

POSTAL ADDRESS .....

STREET ADDRESS .....

CONTACT PERSON .....

TELEPHONE NUMBER Code ..... Number .....

CELL PHONE NUMBER Code ..... Number .....

FACSIMILE NUMBER Code ..... Number .....

E-MAIL ADDRESS .....

**Signature of Bidder** ..... **Date** .....

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## 1. NOTICE AND INVITATION TO SUBMIT PROPOSALS

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

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

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

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

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

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

SCM Department

Telephone: 011 038 4300

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

The closing time for receipt of Proposals is at:

**11h00 on Friday 02 May 2025**

## 2. SUBMISSION DATA – SPECIFIC CONDITIONS OF CONTRACT.

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

3.	<p><b>Bid Clarification Meeting</b></p> <p>A compulsory briefing meeting with representatives of the Employer will take place on the <b>15 April 2025 at 11:00am via Teams.</b></p> <p>Bidder must Join using the below Link.</p> <p><b>Microsoft Teams</b> <a href="#">Need help?</a>  <a href="#">Join the meeting now</a></p> <p>Meeting ID: 386 802 486 605  Passcode: Ra2kx2g3</p>
4.	<p><b>ELECTRONIC RETURN OF SUBMISSIONS AND NO MANUAL SUBMISSION WILL BE ACCEPTED.</b></p> <p>Submissions / Bid Documents may be returned to the CLIENT by means of Electronic Submissions via E-Mail. The Submission E-Mail address designated is <a href="mailto:2224.procurement@sanedi.org.za">2224.procurement@sanedi.org.za</a></p> <p>The Bidder shall ensure that the Bid Documents Returnable Schedules together with all Statutory Returns are duly completed, signed and scanned and uploaded to the designated E-mail address in a lock PDF format file.</p> <p>Documents transmitted in an editable format will be regarded as non-returns and may render the submission unresponsive. Telephonic, telegraphic, telex, facsimile submissions offers will not be accepted.</p> <p>The size limits for SANEDI Email is <b>20 MB</b>. Bidders may submit more than one E-mail.</p>
5.	<p>The closing time for submissions is as stated in the Notice and Invitation to Submit a Proposal Quotation, in the manner specified is</p> <p><b>Closing date: Friday, 02 May 2025 at 11h00</b></p> <p>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.</p>

6.	<p>The Bidder holds SANEDI harmless and indemnifies SANEDI in the event of any failure that prevents or delays the bid submission from being in the designated Tender Box/email address at the time of Bid Closure.</p> <p>Bidders are prohibited from using SANEDI Staff acting as their couriers, agents or delivery mediums to deposit bids in the tender box, and the bidder acknowledges that the use of SANEDI staff in this way will immediately disqualify their tender submission.</p> <p>It is the sole responsibility of the bidder to ensure that the documents submitted via PDF format are not corrupt and that any corrupt documents received by the closing date will be automatically excluded from being evaluated.</p>
7.	<p><b>Information and data to be completed in all respects</b></p> <p>Accept that Bid offers, which do not provide all the data or information requested completely and in the form required, may be regarded by the Employer as non-responsive.</p> <p>Accept that the Employer shall not assume any responsibility for the misplacement or Premature opening of the tender offer if the Bid is not submitted in the required format and clearly marked with the bid reference and placed in the designated tender box before bid closing.</p>
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

#### 4. INTRODUCTION

SANEDI seeks to appoint a Transaction Advisor (**the “Transaction Advisor” or “TA”**) to render services (**the “Services”**), in respect of the development of accelerating the shift towards electric mobility (**“e-Mobility”**) project in South Africa (**the “Project”**). The TA/ Bidder will review applicable policies and recommend actions to close any existing gaps, undertake feasibility study for the individual projects, develop standardized documentation and contribute to establishing an enabling environment for scaling up. A description of the Services is provided in section 3.2.

#### 5. PROJECT BACKGROUND

In 2019, the Global Environment Facility (GEF) Council approved the Global Programme to support countries with a shift to electric mobility. The program is led by the United Nations Environment Programme (UNEP) and to date consists of twenty-seven (27) national child projects that are developed by different countries including South Africa in partnership with GEF Agencies. The objective of the global program is to support countries to design and implement electric mobility programs as part of an overall shift to a sustainable, low-carbon transport sector.

Although the electrification of vehicles and expansion of public transport has been identified as a priority in South Africa, important barriers exist that hinder the fast uptake of electric mobility in general and the use of electric buses (or e-Buses) and mini-bus taxis. The South African child project aims to accelerate the shift towards electric mobility by demonstrating the technical, operational, and socio-economic viability of e-Buses in the metropolitan (metros) space. The Development Bank of Southern Africa (DBSA), is the accredited Implementing Agency for the GEF which in turn appointed the South African National Energy Development Institute (SANEDI) as the Executing Agency for the Project.

The project has selected three beneficiary cities for the e-Buses demonstration: two cities in Gauteng Province and one in KwaZulu Natal Province

It is the aim of the Project to:

- Reduce the financial and operational risks linked to the introduction of this novel technology through granting part of the necessary funds to put in service electric buses within the demonstration phase of the project, co-financed by the participating cities, the DBSA and other partners;
- prove the economic feasibility of the integration of renewable power into the South African transport sector;
- provide a policy review to create an enabling environment for the roll-out of electric buses in South Africa as well as build capacity for operation and maintenance; and
- Reduce barriers associated with the higher upfront investment cost of electric buses during the scaling-up of the project through blended finance to the participating metros.

The Project interventions are designed to create the right enabling eco-system across stakeholders on scaling up the adoption and deployment of e-Buses in the cities and ultimately the country. This Project also addresses the challenge of GHG emissions in South Africa, where the transport sector is one of the biggest contributors. The Project is well aligned with the Green Transport Strategy (GTS) of South Africa. It will incorporate GHG reduction targets, promote energy efficient transport systems, boost

incentives for EV manufacturers, promote research on EV batteries and regulatory support for transition of municipal transport fleet to cleaner technology/ fuel.

## 5.1 Project Objectives

The purpose of the project is to accelerate the shift towards electric mobility by demonstrating the technical, operational, and economic viability of e-Buses. It aims to provide technical assistance across a range of activities; an investment component to design, test financing and business models for the demonstration of e-Buses and charging infrastructure deployment. In addition, is the development of national strategic e-Bus roadmap development with targets, demand and supply side measures as well as gender/ (Elderly – Women – Children – Disabled) EWCD features. The roadmap is expected to foster the integration of low carbon electric mobility in public transport. This project also focuses on low carbon charging infrastructure options and battery recycling, reuse and effective disposal management systems.

The project will create an enabling environment for the roll-out of electric buses in South Africa as well as building capacity for the operation and maintenance of electric buses. The successful demonstration of electric buses is expected to catalyse and complement additional investment resources from funding agencies/partners and active participation from the private sector.

The Project objectives are as follows:

- Provide a policy review to create an enabling environment for the roll-out of electric buses in South Africa as well as to build capacity for operation and maintenance post implementation;
- reduce the financial and operational risk linked to the introduction of this novel technology by granting part of the necessary funds to put e-Buses in service within the demonstration phase of the project;
- assist in demonstrating the technology, ensuring that the cities gain the necessary experience and evidence of the socio-economic benefits of electric buses;
- prove the economic feasibility of the integration of renewable energy into the South African transport sector and associated environmental benefits towards the country's net-zero path; and
- reduce barriers associated with the high upfront investment cost of e-Buses during the scaling-up of the project through a blending of resources from climate funds and other financiers.

The Project also encompasses the establishment of a National e-Mobility Knowledge Hub to enhance multi-stakeholder capacity building. This Knowledge Hub will disseminate capacity building programs for public transport stakeholders with focus on technical specifications, operational and financial planning for low carbon recharging of e-Buses. The experience and best practices from demonstration projects will also be shared with stakeholders for large-scale procurement and operation of e-Buses in South Africa.

The proposed Project actions are structured across four components listed below, which are necessary to address the barriers and facilitate the on-going country efforts in adopting e-mobility in the public transport sector.

- Component 1: Policy development for an integrated and sustainable mass-transit transport solution for South African cities

- Component 2: Deployment and demonstration of electric buses
- Component 3: Institutional capacity building to support the implementation of a large-scale public transport sector transformation
- Component 4: Scaling-up of the electric bus fleet

## **6. SCOPE OF THESE TERMS OF REFERENCE**

The proposed project actions will be implemented in a staged approach, structured into seven deliverables namely;

Deliverable 1: Preliminary Stage

Deliverable 2: e-Mobility Gap Analysis

Deliverable 3: Feasibility Studies

Deliverable 4: Procurement of Buses

Deliverable 5: Project Operations and Maintenance

Deliverable 6: Standardization of processes and documentation

Deliverable 7: Business case for at-scale implementation

The above deliverables will be contracted in two (2) phases. Phase 1 will encompass deliverables 1 through 5. Data collected from Phase 1, including lessons learned, will be used as critical input for the successful implementation of deliverables 6 and 7, which will enable scaling up the electric bus fleet.

The service provider will be contractually obligated to commence and complete deliverables 1 to 5 of the scope of work immediately upon award. Deliverables 6 and 7 will also be awarded under the same services agreement, subject to the following conditions: (i) the successful completion of deliverables 1 to 5, with all relevant data made available, and (ii) satisfactory performance by the service provider throughout deliverables 1 to 5.

Service provider will be expected to report the project progress e.g. weekly, monthly, quarterly, with annual reports and presentations.

SANEDI will reserve the right to either (i) proceed with deliverable 6 and 7 at the quoted price or (ii) terminate the contract without any claim from the service provider due to such termination. The conditional nature of Phase 2 will be explicitly outlined in the letter of award and incorporated as a condition in the services agreement. Should these conditions not be met, SANEDI will have the right to terminate the agreement without further obligation.

In delivering the scope of work, the Transaction Advisor should consider the bankability dimension which includes but is not limited to:

- socio-economic and political considerations;
- commercial, legal, and regulatory considerations;
- technical, environmental, and project-specific considerations;
- financial and commercial structure;
- third-party risk allocation; and
- other related contractual arrangements.

## **6.1 Duration of Assignment**

This Terms of Reference (TOR) is predicated on the expectation that deliverables 1 to 4 scope of work will be finalized within an approximate timeframe of 24 months from the appointment of the Transaction Advisor and a further 12 months for deliverables 5, 6 and 7. It is important to acknowledge that specific tasks and deliverables will carry differing deadlines within this duration. Additionally, completion dates for certain deliverables are contingent upon the active involvement and responsiveness of key stakeholders/departments. SANEDI will maintain its engagement to facilitate effective stakeholder participation, thereby facilitating the timely completion of tasks and activities.

## **6.2 Scope of Services**

The required services consist of the scope of work and all seven deliverables that include but are not limited to:

- Policy development for an integrated and sustainable mass-transit transport solution for South African cities;
- Feasibility assessment of the selected pilot projects in the selected Cities;
- Deployment and demonstration of electric buses in the selected Cities;
- Standardization of key processes and documentation to enable scaling up of electric buses in the country;
- Institutional capacity building to support the implementation of a large-scale public transport sector;
- Business case for at-scale implementation i.e. the rest of the cities to develop a National Electric Bus

The TA/ Bidder is expected to run some of the activities in parallel to maximize efficiencies.

**Table 1: Scope of Work and Deliverables**

Sub Deliverable (s)	Summary Description	Timeframe
<b>Deliverable 1: Preliminary Stage</b>		
Project Implementation Plan (Inception report)	<ul style="list-style-type: none"> <li>Undertake a detailed assessment of the transport sector, including opportunities, risks, and challenges impacting the sector;</li> <li>Interfacing with SANEDI, the DBSA, the selected cities for the pilot phase to understand in detail the technical aspects of the project; and</li> <li>Develop a preliminary project report/Project implementation plan that focuses on the following:               <ul style="list-style-type: none"> <li>the detailed approach and methodology, project plan outlining the major milestones and deliverables along with their estimated start and end dates (in Microsoft Project format, minimum level 3 schedule data with critical path for the project);</li> <li>stakeholder engagement &amp; management / communication plan;</li> <li>risk management plan;</li> <li>change management plan; and</li> <li>evaluation and reporting (what constitutes the project to be successful, how will performance be measured and project outcomes be reported).</li> </ul> </li> </ul>	6 weeks
<b>Deliverable 2: e-Mobility Gap Analysis</b>		
Conduct a detailed e-Mobility gap analysis in South Africa for the entire value chain i.e. from planning, policy financing, implementation, maintenance etc.)		
e-Mobility Gap Analysis Report	<ul style="list-style-type: none"> <li>Review all existing policies, legislative framework, and documentation ("Policy framework") that were adopted at national, regional/provincial and city level, policies to foster the integration of low carbon electric vehicles/buses</li> <li>Review the existing demand and supply for e-Mobility including the infrastructure, skills, capacity, financing and funding, operations and maintenance.</li> <li>Conduct a due diligence on the funding models applicable to the e-Mobility Project;</li> <li>Benchmark with other international countries to analyse their implemented policy framework. This includes an assessment of their effectiveness, potential challenges, and unintended consequences.</li> <li>Conduct an analysis to identify any existing gaps and offer recommendations for enhancing e-Mobility related policy framework.</li> <li>Collaborate with the Department of Trade, Industry and Competition (DTIC), Department of Transport (DoT) and any other relevant stakeholders to revise the policy framework.</li> <li>Coordinate a comprehensive review process involving stakeholders to solicit feedback and comments on the</li> </ul>	15 weeks

Sub Deliverable (s)	Summary Description	Timeframe
	<ul style="list-style-type: none"> <li>revised policies, subsequently integrating these inputs into the policy framework for finalization</li> <li>Support the process, led by the relevant authorities, including the DTIC, DoT, DMRE and others for adoption and implementation of the policy framework</li> </ul>	
Risk Register	<ul style="list-style-type: none"> <li>Compile and manage the risk register (i.e. technical, commercial, operational, maintenance, social, legal etc.), and possible ways to mitigate the risks and bankability challenges identified for the Project in collaboration with the SANEDI and the municipalities.</li> </ul>	
<p align="center"><b>Deliverable 3: Feasibility Studies</b></p> <p>Conduct a comprehensive feasibility study for each of the cities forming part of the pilot project to evaluate the practicality and feasibility of introducing electric buses within the existing transportation infrastructure. The study will provide city authorities with evidence-based insights to inform the planning, investment, implementation, operations and maintenance of electric bus systems in the cities. The feasibility study should assess the following but not limited to:</p>		
Sub Deliverables	Description of work packages	Timeframe
<ul style="list-style-type: none"> <li>Draft policies (i.e. National policies for the taxation of the import of e-Buses, batteries, EV powertrain, and EVSE components are revised in cooperation with DTIC, Battery recycling and re-use disposal policy and operationalized in cooperation with DFFE) informed by among other the outcomes of the technical, financial and institutional / governance arrangement deliverables</li> <li>Prepare submissions for all Governance approvals i.e., city council and all its sub-committees for the approval of the feasibility study and proposed enablement activities including permitting (if required).</li> </ul>	<p><b>Policy, Regulatory, Governance and Institutional Analysis:</b></p> <ul style="list-style-type: none"> <li>Conduct a comprehensive analysis of all current and applicable legislation, regulatory frameworks, and policies that may have a bearing on the e-Mobility Programme, both directly and indirectly.</li> <li>The study reviews existing regulations, policies, and incentives related to electric busses and public transportation, identifying barriers and opportunities for implementation and recommending policy interventions to support the rollout of electric buses</li> <li>Establish an intergovernmental governance framework for the implementation of the e-Mobility Programme</li> <li>Provide a detailed evaluation of options for the proposed institutional arrangements for the implementation of the project</li> <li>Identify, analyse, and provide mitigation of all institutional and implementation risks</li> <li>Identify various procurement options and strategies available for the rollout of the Project</li> <li>Explore the legal implications and risks of the proposed institutional arrangements, procurement options, and strategies</li> </ul>	30 weeks
<p>Technical Report</p> <ul style="list-style-type: none"> <li>Recommended technical design standards for the buses</li> </ul>	<p><b>Technical analysis</b></p> <ul style="list-style-type: none"> <li>Technical feasibility of electric buses, including supporting infrastructure (i.e. charging, road infrastructure, renewables etc.), bus technical</li> </ul>	

Sub Deliverable (s)	Summary Description	Timeframe
<ul style="list-style-type: none"> <li>• Recommended technical standards for the charging infrastructure</li> <li>• Recommended technical standards for renewable energy considerations</li> <li>• Routes identification and/or selection</li> <li>• Performance evaluation template</li> <li>• Prepare submissions for all Governance approvals i.e., city council and all its sub-committees for the approval of the feasibility study and proposed enablement activities including permitting (if required).</li> </ul>	<p>specification and performance, route planning, and reliability under local operating conditions.</p> <ul style="list-style-type: none"> <li>• The technical analysis should include a detailed grid impact study at transmission and distribution levels. In collaboration with NERSA, ESKOM and the relevant municipal electricity department</li> <li>• Conduct detailed options analysis on bus specifications and charging infrastructure including evaluating the viability of renewables which will inform the proposed technical specifications to be approved by the relevant regulatory bodies, i.e. SABS</li> <li>• Provide an analysis of the infrastructure required to meet the e-Mobility Project objectives</li> <li>• Provide an analysis of the end-user service requirements</li> <li>• Plan and design the rollout strategy</li> <li>• Investigate the introduction of intelligent transport systems</li> <li>• Identify any significant impact or constraints caused by the availability or non-availability of environmental aspects including, but not limited to ICT and electricity supply and suggest / provide solutions</li> <li>• Provide detailed costing of the e-Mobility infrastructure</li> <li>• Provide a detailed operation and maintenance strategy for the proposed implementation to ensure sustainability</li> <li>• Identify, analyse and mitigate associated implementation risks; and</li> <li>• Provide detailed recommendations and strategic options for implementation</li> <li>• Identify the necessary permits required, detailing the process of acquiring these.</li> </ul>	
<ul style="list-style-type: none"> <li>• Financing &amp; funding options</li> <li>• Lender's financial model</li> </ul>	<p><b>Financial &amp; Funding Analysis</b></p> <ul style="list-style-type: none"> <li>• Feasibility of transitioning to electric buses, analysing factors such as initial investment costs, operational expenses, potential savings (e.g., fuel and maintenance), and revenue generation mechanisms (e.g., fares, subsidies, and grants). This would also include the development of business models for e-bus operations.</li> <li>• Explore the public and private sector funding options based on the determination of the various market access gaps determined through the other streams of the study. In addition, the financial and funding analysis should explore sources of financing/funding, terms of such financing, credit enhancement, and liquidity facilities including government guarantee mechanism available for municipalities/cities. Alternative financing sources from Development Finance Institutions (DFIs),</li> </ul>	

Sub Deliverable (s)	Summary Description	Timeframe
	<p>Multilateral Development Banks (MDBs), and other commercial financiers should be explored in order to scale development to other parts of the country.</p> <ul style="list-style-type: none"> <li>Consider the outputs of the socio-economic analysis in developing a commercialisation strategy</li> <li>Consider the outputs of the environmental assessment to leverage any environmental funding or climate financing that might be of benefit to the Project, to the extent applicable.</li> <li>Prescribe the funding and/or financing requirements for the project implementation</li> <li>The TA must develop financing models that will be adopted in the procurement of demonstration buses and further scaling up of the technology in the municipal sector. All assumptions for the funding and/or financial models must be clearly articulated and shown. The funding and/financial models must allow flexibility for changes in technical options or costing data.</li> <li>Identify, analyse and mitigate all identified implementation and sustainability risks</li> <li>Provide funding recommendations and strategic options</li> <li>The tariff design/ determination study in line with NERSA standards should be undertaken to ensure billing aspects are addressed at the feasibility study level before engaging stakeholders.</li> </ul>	
<ul style="list-style-type: none"> <li>Socio-economic analysis report</li> <li>Cost Benefit Analysis (CBA)</li> </ul>	<p><b>Socio-economic analysis</b></p> <ul style="list-style-type: none"> <li>Socio-economic impact assessment to evaluate the broader social implications of introducing electric buses, including public health improvements, enhanced mobility, universally accessible transport solutions to cater to the elderly, people with disabilities etc. potential job creation, gender mainstreaming, ownership, management control, skills development, enterprise and supplier development, and socio-economic development.</li> <li>Cost-benefit analysis to quantify the financial implications of transitioning to electric buses compared to conventional fossil fuel-powered buses. This will also include an evaluation of total cost of ownership (TCO) of transitioning to electric buses for various scenarios experience and understanding of undertaking Cost Benefit Analysis (CBA) and Cost Effectiveness Analysis (CEA) on infrastructure projects.</li> <li>Expertise in converting financial values into economic values through the use of conversion factors; and</li> </ul>	

Sub Deliverable (s)	Summary Description	Timeframe
	<ul style="list-style-type: none"> <li>- Ability to calculate economic performance indicators such as the Economic NPV, Economic RR and Cost Effectiveness Ratios (CER);</li> <li>- Ability to demonstrate the distributional impact(s) in relation to the accrual of gains or losses to different stakeholder groups from the implementation of the project.</li> </ul>	
<ul style="list-style-type: none"> <li>• Comprehensive Environmental social assessment report</li> <li>• Provide proof of stakeholder engagement and report</li> <li>• Facilitate the application and approval process of ALL permits required to make the project feasible, that is to enable the procurement and operations of electric buses.</li> <li>• Legal analysis</li> </ul>	<p><b>Environment Social analysis</b></p> <ul style="list-style-type: none"> <li>• The Environmental Impact Assessment regulations (EIA) provide guidelines to determine, assess and evaluate the consequences of the proposed project on the environment. The Environmental Assessment shall be prepared in a manner consistent with the DBSA Environmental Social Safeguards Standards (ESSS) and procedures for a project. The detailed standards will be given to the successful bidder. The standards are:             <ul style="list-style-type: none"> <li>- Standard 1: Screening methodology for project environmental and social risk classification,</li> <li>- Standard 2: Stakeholder engagement and information disclosure,</li> <li>- Standard 3: Gender Mainstreaming,</li> <li>- Standard 4: Indigenous People,</li> <li>- Standard 6: Labour and Working Conditions,</li> <li>- Standard 7: Community Health and Safety.</li> </ul> </li> <li>• Environmental Impact assessment to evaluate the potential environmental benefits of electric buses compared to traditional fossil fuel-powered vehicles, including reductions in greenhouse gas emissions, air pollution, and noise pollution. Evaluation of disposal of materials</li> <li>• The analysis shall include gender-disaggregated data and recommendations that will help formulate the Gender Action Plan and Budget to guide gender mainstreaming during project implementation</li> <li>• Detailed review of all institutional compliance frameworks in line with the Standards Environmental Institutional (SEIAS)</li> <li>• Outline any environmental risks that may arise from the Project implementation and identify possible mitigations</li> <li>• Identify any environmental benefits that may accrue through Programme implementation</li> <li>• Identify climate change considerations associated with the Programme roll out;</li> <li>• Quantify and detail plans on climate mitigation and climate adaptation; and</li> </ul>	

Sub Deliverable (s)	Summary Description	Timeframe
	<ul style="list-style-type: none"> <li>Provide a reporting framework for greenhouse gas (GHG) emissions for Project implementation</li> </ul>	
<ul style="list-style-type: none"> <li>Implementation Plan (operations &amp; maintenance), procurement strategy,</li> <li>Governance structure</li> <li>Risk Register</li> </ul>	<b>Implementation Readiness Plan</b> <ul style="list-style-type: none"> <li>Institutional and capacity analysis including the proposed governance structure for the successful rollout of the Project</li> <li>Provide a detailed implementation plan (with timeframes and resources)</li> <li>Implementation plan which must include the procurement and financing implementation &amp; maintenance strategies</li> </ul>	
<b>Deliverable 4: Procurement of Buses (Pilot)</b>		
Procurement of electric buses and related infrastructure	<ul style="list-style-type: none"> <li>Develop procurement documents, including tools and templates that support efficient contract management and reporting specific to the Cities under the pilot project with the relevant City</li> <li>Handover to the respective cities and support the procurement process. The support will include: <ul style="list-style-type: none"> <li>Assisting the cities with bid clarification; and</li> <li>Support the Bid Evaluation Committee (BEC) to the extent possible</li> </ul> </li> </ul>	40 weeks
<b>Deliverable 5: Project Operations and Maintenance</b>		
Performance monitoring	<ul style="list-style-type: none"> <li>Using monitoring tools developed under deliverable 4, monitor the performance of the pilot project, collate the data and input the learning in the following: <ul style="list-style-type: none"> <li>Deliverable 6: Standardisation of processes and documentation;</li> </ul> </li> </ul>	24 weeks
<b>Deliverable 6: Standardisation of processes and documentation</b>		
<ul style="list-style-type: none"> <li>Develop Standardised Documentation</li> <li>The documents identified in this regard include, without limitation: <ul style="list-style-type: none"> <li>RFQ and RFP documents;</li> <li>Accompanying POPIA provisions and informed consent forms;</li> <li>O&amp;M contract;</li> <li>Lease agreements (if required for charging stations);</li> <li>Financing agreement(s);</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Design, develop and produce, (i) standard documents, and (ii) harmonised processes, to support the (iii) financing and (iv) implementation of the electric buses in the cities.</li> <li>An Implementation, alternatively, Services, alternatively, Consulting Agreement between Implementing Agency and the cities (Project owners), in terms of which the Implementing agency will provide various forms of support to the Project owners, during the implementation, financing and beneficial operations phase of the Projects (i.e., post-conceptualisation, post-feasibility, or post “final-Investment-decision”, up to and including beneficial operation); and</li> <li>Performance evaluation and reporting templates</li> <li>The standardised documents listed above is not exhaustive.</li> </ul>	24 weeks

Sub Deliverable (s)	Summary Description	Timeframe
Harmonised Procurement Process	<ul style="list-style-type: none"> <li>• Develop a harmonised procurement processes to be followed by all Cities and Project role-players. The processes should be founded on transparency and simplicity. Further, the processes should be in line with all applicable procurement legislation including, among others (i) the Constitution, (ii) the Municipal Finance Management Act, 1999, (iii) the Preferential Procurement Policy Framework Act, 2000, (iv) the Competition Act, 1998 and (v) the Broad-Based Black Economic Empowerment Act, 2003.</li> <li>• The harmonised procurement process must align with the constitutional principles which require contracting for Government goods and services to be fair, equitable, transparent, competitive and cost-effective.</li> <li>• Further to the above, the harmonised procurement processes should address, among other things, the following components of procurement activities: <ul style="list-style-type: none"> <li>- the process of inviting bids, RFQs or RFPs;</li> <li>- administrative compliance;</li> <li>- pre-qualification criteria;</li> <li>- functional criteria;</li> <li>- mandatory documents and information;</li> <li>- the process for the submission of bids;</li> <li>- the process for the evaluation and selection of the successful bidder;</li> <li>- the processes for the announcement of the successful bidder; and</li> <li>- the contracting process.</li> </ul> </li> <li>• Once developed, the standardised documents will be used as a template and/or market norms and standards. Therefore, their development and finalisation require key market stakeholder buy-in. Stakeholders include but not limited to the Cities, DBSA, SANEDI, GEF, the DoT, the DTIC, CSIR, DMRE, Eskom, Manufacturing companies, Bus Operators</li> <li>• The Transaction Advisor may identify further key stakeholders, based on its scanning of the market, provided however that SANEDI is notified of, and accepts, the addition of stakeholders beforehand.</li> <li>• In light of the preceding paragraphs, the Transaction Advisor will be required to develop and execute a program for key stakeholder buy-in, including criteria for determining that stakeholder buy-in has been secured</li> <li>• Appropriate referencing on documentation is required.</li> </ul>	4 weeks
Monitoring Tools	<ul style="list-style-type: none"> <li>• Develop and produce monitoring/tracking and data collation tools during the beneficial operation phase and which allow the Cities to: <ul style="list-style-type: none"> <li>- compare actual Project progress or results against plans or projections;</li> </ul> </li> </ul>	8 weeks

Sub Deliverable (s)	Summary Description	Timeframe
	<ul style="list-style-type: none"> <li>- monitor the projects to timely identify, report risks and ensure suitable risk plans are put in place;</li> <li>- document all project information throughout the project lifecycle;</li> <li>- obtain and record all project information that provides project status, measurements of progress and forecasting to update costs and schedule information that will be reported to all key stakeholders; and</li> <li>- monitor all approved project or scope change requests.</li> <li>- implement early warning systems;</li> <li>- produce a project performance dashboard for reporting purposes;</li> <li>- analyse actual or projected performance data, to determine if corrective or preventative action should be recommended;</li> </ul>	
Design a knowledge hub	<ul style="list-style-type: none"> <li>• Design and implement a web based knowledge hub that serves as a valuable resource for stakeholders in the electric bus industry or anyone interested in electric buses, enabling them to access timely and relevant information to support their decision-making and operations.</li> <li>• Consideration should be given to the primary users of the knowledge hub . This could include operators of electric bus fleets, maintenance technicians, policymakers, researchers, and the general public. The users must easily find, access, and engage with the information they need.</li> <li>• The primary objectives of the knowledge hub, encompasses disseminating knowledge on electric bus technology, offering guidance on implementation and operational best practices, providing maintenance protocols, sharing resources on funding and policies, and showcasing case studies of successful electric bus initiatives. It will delve into intricate subjects like: <ul style="list-style-type: none"> <li>- battery technology, shedding light on advancements, efficiency, and sustainability.</li> <li>- the nuances of charging infrastructure, explaining diverse methodologies, standards, and considerations necessary for establishing robust charging networks.</li> <li>- address the complexities of route optimization, providing insights into strategies for enhancing efficiency, minimizing costs, and maximizing service reliability.</li> <li>- highlight the substantial environmental benefits associated with electric buses, including reduced emissions, noise pollution, and reliance on fossil fuels, thereby emphasizing their pivotal role in</li> </ul> </li> </ul>	24 weeks

Sub Deliverable (s)	Summary Description	Timeframe
	<p>fostering cleaner and greener urban transportation ecosystems; and</p> <ul style="list-style-type: none"> <li>the hub will delve into financial considerations, including cost-effectiveness, return on investment, funding mechanisms, incentives, and financial planning strategies crucial for facilitating the widespread adoption of electric buses.</li> </ul>	
<b>Deliverable 7: Business case for at scale implementation</b>		
<ul style="list-style-type: none"> <li>Bankable Feasibility study for scaling up in the selected Cities Business case for the rest of the cities across South Africa</li> </ul>	<ul style="list-style-type: none"> <li>Scale-up of the e-mobility project across South African cities. Based on the lessons learned from the pilot phase, conduct the: <ul style="list-style-type: none"> <li>Bankable Feasibility studies for scaling up in the 3 Cities</li> <li>Business case for the rest of the Cities.</li> </ul> </li> </ul>	20 weeks

### 6.3 TA/Bidder Key Experts

The Skills and Expertise Required by the Bidder is summarised in Table 2 below;

**Table 2: Key Expert Skills**

Key Experts	Envisaged Position	Minimum Qualifications and Category of Professional Registration	Key Service(s) / Discipline
1	Transport Engineer / Planner	<p>Bachelor's degree in Civil Engineering, with ECSA professional registration or equivalent.</p> <p>Must have at least 10 years of relevant experience in transport planning (emphasis on public transport), conducting feasibility studies, and procurement of public sector projects.</p> <p>Evidence of professional registration is required.</p>	Technical / Lead
2	Electrical Engineer	<p>Bachelor's degree in Electrical / Mechanical Engineering with professional ECSA registration or equivalent</p> <p>Must have at least 10 years of relevant experience in planning and design for the Electrical Engineering infrastructure including renewable energy, transport, supporting infrastructure, and conducting feasibility study. Procurement of public sector projects is required.</p> <p>Evidence of professional registration is required.</p>	Technical / Lead
3	Legal and Regulatory	<p>Appropriate legal qualification(s)</p> <p>Must have at least 10 years of relevant legal and regulatory experience in the transport sector, and</p>	Legal

		<p>procurement of public sector projects including experience in public transport transition</p> <p>The legal resource(s) must have an understanding and knowledge of the different project deliveries and applicable contracting forms (agreements)</p> <p>Evidence of registration (Admitted attorney) is required</p>	
4	Financial Analyst / Modeller	<p>Bachelor's degree in commerce or BSc actuarial science.</p> <p>Must have at least 10 years of relevant experience in conducting financial models of large-scale infrastructure projects / programmes, especially transport sector.</p> <p>The financial analyst/advisor must be a registered Charter Accountant in South Africa CA(SA) or Chartered Financial Analyst (CFA) or equivalent registration.</p> <p>The Transaction Advisor or Consortium must demonstrate proven experience in achieving final investment decisions (FIDs)</p> <p>Evidence of professional registration is required.</p>	Finance
5	ESG and Gender Expert	<p>BSc (Hons) in Environmental Studies or equivalent qualification</p> <p>Must have at least 7 years of relevant experience in environmental management relevant to the transport sector including experience in planning and implementing climate adaptation and mitigation projects</p>	Environment
6	Economic Analysis Expert	<p>Economic Analysis Specialist with a minimum of Master's degree in Development Finance, Economics, Econometrics, Statistics, or related field.</p> <p>Must have at least 7 years of experience and understanding of undertaking Cost Benefit Analysis (CBA) and Cost Effectiveness Analysis (CEA) on infrastructure projects :</p>	Economics

The experts shall have a minimum of qualifications, professional registration, and post-registration experience as specified. The CV (use the CV template provided – Annexure 1) must clearly state the individual's relevant qualifications and employment history, detailed work history which includes the organization, role, tenor (indicating the dates of commencement and departure), responsibilities and sector should be provided to support the number of years of professional experience.

**For international qualifications, the relevant South African Qualification Authority (SAQA) equivalent to be indicated.**

It should be noted that the SAQA process may take a relatively long time. Proof that the SAQA process was initiated is required and the bidder has to specify the NQF level of their qualifications. Should the bidder be successful, the WPO may liaise with SAQA to verify their NQF qualification level prior to formal appointment.

## **7. PRE-QUALIFICATION CRITERIA**

### **7.1 Skills, Experience and Availability**

The prospective Transaction Advisor (TA) must have both the skills and experience necessary to undertake the tasks set out in these Terms of Reference. In addition, the TA/ Bidder must be able to demonstrate a comprehensive understanding of the requirements of the assignment that is the subject matter of these Terms of Reference.

The prospective TA's project lead or coordinator must have proven client relationship management skills and experience with managing multifunctional teams, and be in good standing in all respects, including ethically and professionally registered where applicable. Each individual on the team must be personally available to do the work as and when required. The Lead Advisor will be held accountable, in terms of the TA contract, for ensuring project deliverables and for the professional conduct and integrity of the team.

***THE BIDDER MUST ENSURE THAT THE INDIVIDUALS EVALUATED AS PART OF THE SUBMISSION ARE AVAILABLE FOR THE INCEPTION MEETING AND THROUGHOUT THE PROJECT DURATION. IN THE EVENT OF THE INDIVIDUAL/S BEING CHANGED DURING THE ASSIGNMENT THEN AN INDIVIDUAL/S WITH SIMILAR OR MORE EXPERIENCE AT A MINIMUM MUST BE PROVIDED, WHICH SHALL BE APPROVED IN WRITING BY SANEDI.***

The lead role can be fulfilled by a Transport engineer or Electrical Engineer expert (must be the same person that will be assessed under the evaluation criteria (stage 2)) but it must be clearly indicated in the resource allocation.

The key personnel must meet the following minimum criteria:

**Table 3: Project Lead Expertise**

1. NO	LEAD EXPERT		
	Item	Requirements	YES/NO
1.	<b>Qualification</b>  Civil Engineer (Transport)  OR  Electrical Engineer	Qualifications  Minimum qualification: Degree in Civil Engineering  OR  Minimum qualification: Degree in Electrical Engineering  Attach certified proof of qualification and ECSA professional registration or equivalent	
2.	<b>Experience</b>	Civil Engineer (Transport) must have at least 10 years of relevant experience in transport planning, with emphasis on public transport and conducting feasibility studies and procurement of public sector projects.  OR  Electrical Engineer must have at least 10 years of relevant experience in planning and design of the electrical engineering infrastructure including renewable energy, conducting feasibility studies and procurement of public sector projects.  <b>Use C.V template in Annexure 1</b>	
3.	<b>Projects Undertaken</b>	The expert must provide the list of projects with the following: company, role/ responsibility, project name, detailed work packages, duration of the project, client, and the Capital value of the project;  <b>Use C.V template in Annexure 1</b>	

As part of the submission requirements, the Bidder is required to complete the prequalification stated in Table 3 above indicating the expertise of the project lead.

*If you don't meet the above criteria you will not proceed to stage 2(Evaluation Criteria)*

## 8. EVALUATION CRITERIA

### 8.1 Responses to the Evaluation Criteria

The evaluation will follow a two-staged approach; i) Pre-Qualification Criteria in Table 3 and ii) Evaluation Criteria in Table 5. The Bidder should meet the minimum criteria as set out in the pre-qualification in order to proceed to stage 2 Evaluation criteria.

#### 8.1.1 File name: resource matrix (staffing proposal)

- **A Resource Matrix indicating the lead specialist and other key specialists and the role that each specialist will fulfil.**
- Considering the Project objectives, the prospective TA's team should at a minimum, consist of the key specialists each of whom must be an individual with the skills, knowledge and experience to achieve the project objectives.
- Supporting team members (Key specialists) must also be clearly indicated, including their roles; A brief description of the role of the supporting team is indicated below. The supporting team must comprise of at least one suitably qualified specialist as listed below **but not limited to**:
  - Transportation Expert to assess the feasibility of integrating electric buses into existing infrastructure. Analyse route optimization, passenger demand patterns, and modal integration, knowledge of intelligent transport systems.
  - Technical Expert (Electrical Engineer) to provide insights into the selection of suitable electric buses, battery technologies, charging infrastructure requirements renewable energy and resources and vehicle-to-grid integration possibilities. To design and oversee the Pilot Phase implementation of charging infrastructure, including depot charging stations, en-route charging infrastructure, and grid connection requirements.
  - Financial Analyst to evaluate financing options, assess the financial feasibility of the project, and advise on funding mechanisms.
  - Economist to conduct socio economic impact assessment and cost-benefit analyses.
  - Legal Advisor to navigate the regulatory landscape, including licensing requirements, environmental regulations, procurement laws, and contractual agreements with suppliers and service providers.
  - Environmental Expert to assess the environmental impact of electric buses compared to conventional diesel or petrol buses, including air quality improvements, greenhouse gas emissions reductions, and noise pollution mitigation.
  - Community Engagement Specialist to facilitate stakeholder consultations, gather public feedback, address concerns, and build support for the transition to electric buses among residents, businesses, and other stakeholders.
  - Project Manager to oversee the overall implementation process, coordinate activities among different team members, monitor project timelines and budgets, and ensure that objectives are met effectively and efficiently.
- The prospective TA may have the key personnel in its direct employ or may have access to the personnel through contractual arrangements (valid as at the date of the prospective TA's proposal), such as partnerships, teaming or joint bidding agreements, which must be indicated together with the date when they were concluded (i.e. signed by all relevant parties).

### 8.1.2 File Name: Curriculum Vitae

**CVs for the Project Lead Specialist and the Supporting Key Specialists (must be completed in the template specified in Annexure 1)** with a clear indication of which role each specialist will play on the project.

**NB: THE PROJECT LEAD SPECIALIST, AND NOT SUPPORTING TEAM MEMBERS (KEY SPECIALISTS) WILL BE SCORED UNDER “KEY PERSONNEL” FUNCTIONAL CRITERIA. SUPPORTING TEAM MEMBERS WILL HOWEVER CONTRIBUTE TOWARDS THE “STAFFING” SCORE IN THE PROJECT COMPREHENSION, APPROACH AND METHODOLOGY EVALUATION SECTION.**

Each CV (in the template specified in Annexure 1) must:

- clearly indicate the individual’s relevant qualifications and employment history;
- contain a brief description of the key projects that the specialists have **personally** worked on, including:
  - the scope and duration of each project;
  - the location of the project;
  - the length of the individual’s tenure on the project ;
  - the individual’s key activities and responsibilities; and
  - achievements on the project.

Each CV must be limited to 3 pages in length. **Certified copies of all academic and professional qualifications, as well as professional body registration certifications should accompany each CV.**

### 8.1.3 File Name: Project Reference List

A **Project Reference List** (in the template specified in Annexure 1) indicating the names of up to 3 projects that are relevant to the assignment must be submitted in respect of the Project Lead Specialists and each Key Specialist. The project list should include:

- the client whom the project was completed for and the role undertaken;
- a project completion certificate or contactable references;
- the project duration;
- the project location;
- the project approach;
- the project start and end dates; and
- the project’s value-add, or benefit derived from the project.

Each project description should be no longer than 150 words.

#### **8.1.4 File Name: Methodology and Approach Proposal**

A **Methodology and Approach** proposal must be included, in terms of which the Bidder must explain the methodology and approach that will be followed to achieve at each stage the project's objectives. **Also** contained in the Methodology and Approach must be:

- the proposed Assignment Implementation Plan including timeframes; and
- a preliminary risk management plan for any risks identified in these terms of reference and any other risks identified by the Bidder; and
- Staffing proposal in line with requirements of the Terms of Reference and methodology proposed by the bidder.
  - The proposal makes a clear and compelling case for skills transfer (to the team members) and for meaningful participation in the assignment by all team members.
  - Each team member has a clearly defined role and reason for being on the assignment.
  - Availability of senior backstopping for key personnel - i.e., suitably qualified and experienced support professionals.

Only the required or reasonably essential documentation or information needs to be provided.

#### **8.1.5 Company Experience**

The Transaction Advisor or Consortium must demonstrate proven experience in achieving final investment decisions (FIDs) and implementation in public transport.

The Company must provide projects where work of a similar nature (preparation, design, and structuring of public transport projects, procurement of public infrastructure including PPPs, etc.) has been completed:

Include the name of the client, project duration, and value of the project in the template specified in Annexure 2.

### **8.2 Functional Criteria Scoring**

The evaluation criteria that will be used to test the capability of Bidders is provided in the Table 5 below. The technical score will be calculated out of 100 points. Table 4 will be used to evaluate whether bidders who have passed the eligibility criteria are competent and have the required experience before competing on price. Responses will be evaluated according to the extent to which they are able to fulfil the requirements of SANEDI, as stipulated in this RFP document. Evaluation criteria will be weighted with particular emphasis on the following areas:

### 8.2.1 Functional Criteria Weighting

**Table 4: Functional Criteria Weighting**

EVALUATION ELEMENT	MAXIMUM SCORE
Key Experts	50
Project comprehension, approach, and methodology, including staffing proposal	30
Company Experience	20
<b>TOTAL</b>	<b>100</b>
<b>NB: Minimum Threshold for Functional Qualification</b>	<b>75</b>

**All bidders will be subjected to the same evaluation criteria; only bidders who achieve a minimum score of 75 will proceed to Pricing evaluation.**

### 8.2.2 Evaluation Criteria

The Key experts must provide the following: detailed experience, the company worked for, role, duration, description of work conducted, project name, and the Capital value of the project; use the template in Annexure 1. The information provided should be detailed such that the evaluator/s will be able to determine whether the experts were directly involved in the assignment (not be generic).

**Table 5: Evaluation Criteria**

NO.	EVALUATION CRITERIA OR ELEMENT	SCORING FOR THE WHOLE ELEMENT	WEIGHTING %
	(Failure on the part of the Project Lead Specialist to score at or above the minimum threshold on the minimum expertise will lead to the disqualification of the bidder and the rejection of the bid in its entirety)		
<b>1.</b>	<b>KEY EXPERTS</b>	<b>SCORING</b>	<b>WEIGHT (%)</b>
<b>1.1</b>	<b>Transport Engineer</b>	<b>Scoring</b>	<b>10</b>
	1.1.1 Bachelor's degree or higher in Civil Engineering with registration.  Evidence of ECSA professional registration or equivalent is required.	<b>Qualification Points:</b> <ul style="list-style-type: none"> <li>• 3 points = Master's Degree</li> <li>• 2 points = Honors Degree</li> <li>• 1 point = Degree</li> <li>• 0 = No documentary evidence of bachelor's degree and/or professional registration (or valid practice number)</li> </ul> <b>Include certified proof of qualification</b>	3

	<p>1.1.2 Must have at least 10 years of relevant experience in transport planning, with emphasis on public transport and conducting feasibility studies. Procurement of public sector projects is required.</p> <p>Proven experience in developing sustainable transport projects and models. The feasibility studies undertaken must be successfully implemented.</p> <p>List of all relevant and successful projects undertaken and role played must be included in the CV. Use CV the template in Annexure 1</p>	<p><b>Years of Experience Points:</b></p> <ul style="list-style-type: none"> <li>• 4 points = 15 and above</li> <li>• 2 points = 10 years and above</li> <li>• 0 = less than 10 years</li> </ul> <p><b>Experience in successfully implementing projects in transport planning, with emphasis on public transport and conducting feasibility studies:</b></p> <ul style="list-style-type: none"> <li>• 3 points = 5 projects and above</li> <li>• 2 points = 3 projects and above</li> <li>• 1 point = 1 project and above</li> <li>• 0 = no experience in developing sustainable transport projects and model</li> </ul>	<p>4</p> <p>3</p>
<b>1.2</b>	<b>Electrical Engineer</b>	<b>Scoring</b>	<b>10</b>
	<p>1.2.1 Bachelor's degree in Electrical with registration.</p> <p>Evidence of ECSA professional registration or equivalent is required.</p>	<p><b>Qualification Points:</b></p> <ul style="list-style-type: none"> <li>• 3 points = Master's Degree</li> <li>• 2 points = Honors Degree</li> <li>• 1 points = Degree</li> <li>• 0 = No documentary evidence of bachelor's degree and/or professional registration (or valid practice number)</li> <li>• <b>Include certified proof of qualification</b></li> </ul>	3
	<p>1.2.2 Must have at least 10 years of relevant experience in planning and designing the Electrical Engineering infrastructure including renewable energy and conducting feasibility studies. Procurement of public sector projects is required.</p> <p>List of all relevant projects undertaken and role played must be included in the CV. Use CV Template in Annexure 1</p>	<p><b>Years of Experience Points:</b></p> <ul style="list-style-type: none"> <li>• 4 points = 15 and above</li> <li>• 3 points = 10 years and above</li> <li>• 0 = less than 10 years</li> </ul> <p><b>Experience in planning and designing the Electrical Engineering infrastructure including renewable energy and conducting feasibility studies:</b></p> <ul style="list-style-type: none"> <li>• 3 points = 5 projects and above</li> <li>• 2 points = 3 projects and above</li> <li>• 1 point = 1 project and above</li> <li>• 0 = no experience in developing sustainable transport projects and model</li> </ul>	<p>4</p> <p>3</p>
<b>1.3</b>	<b>Legal Expert</b>	<b>Scoring</b>	<b>8</b>
	<p>1.3.1 Appropriate legal qualification(s)</p> <p>Evidence of professional registration (Admitted attorney)</p>	<p><b>Qualification Points:</b></p> <ul style="list-style-type: none"> <li>• 3 points = Masters (NQF 9)</li> <li>• 2 points = Postgraduate LLB (NQF 8)</li> <li>• 1 points = Legal Degree (NQF 7)</li> </ul>	3

		<ul style="list-style-type: none"> <li>• 0 = Irrelevant Qualifications or non-submission of certified copy of Qualifications and/or SAQA certificate</li> </ul> <p><b>Include certified proof of qualification</b></p>	
	<p>1.3.2 Must have at least 10 years of relevant legal and regulatory experience in the transport sector and procurement of public sector projects including experience in public transport transition</p> <p>A track record of providing infrastructure advisory services including drafting and negotiating agreements/Commercial agreements (including PPP's), Project Finance.</p> <p>List of all relevant projects undertaken and role played must be included in the CV. Use CV Template in Annexure 1</p>	<p><b>Years of Experience Points:</b></p> <ul style="list-style-type: none"> <li>• 3 points = 15 and above</li> <li>• 2 points = 10 years and above</li> <li>• 0 = less than 10 years</li> </ul> <p><b>Experience in infrastructure advisory services including drafting and negotiating agreements/Commercial agreements (including PPPs):</b></p> <ul style="list-style-type: none"> <li>• 2 points = 3 projects and above</li> <li>• 1 point = 2 projects</li> <li>• 0 point = 1 project and below</li> </ul>	<p>3</p> <p>2</p>
<b>1.4</b>	<b>Financial Expert</b>	<b>Scoring</b>	<b>10</b>
	<p>1.4.1 Relevant Bachelor's degree in Commerce/ Science/ Engineering or quantitative degree</p> <p>1.4.2 Evidence of professional registration is required CA(SA) or Chartered Financial Analyst (CFA) or equivalent registration</p>	<ul style="list-style-type: none"> <li>• 3 points = Masters and above (NQF 9)</li> <li>• 2 points = Honours Degree (NQF 8)</li> <li>• 1 point = Degree (NQF 7)</li> <li>• 0 = Irrelevant Qualifications or non-submission of certified copy of Qualifications and/or SAQA certificate</li> </ul> <p><b>Include certified proof of qualification</b></p>	3
	<p>1.4.3 Must have at least 10 years of relevant experience in conducting financial models of large-scale infrastructure projects / Programmes, especially in the transport sector.</p> <p>Must demonstrate the following skills and experience :</p> <ul style="list-style-type: none"> <li>- His/her experience in achieving financial close/ and final investment decisions (FID).</li> <li>- An ability to obtain credit enhancement including a guarantee mechanism from the National Treasury or any other private guaranteed mechanism.</li> <li>- Project and corporate finance expertise</li> <li>- Ability to conduct budget analysis</li> <li>- Understanding and knowledge of financial modelling and ability</li> </ul>	<p><b>Years of Experience Points:</b></p> <ul style="list-style-type: none"> <li>• 4 points = 15 and above</li> <li>• 3 points = 10 years and above</li> <li>• 0 = less than 10 years and no relevant experience</li> </ul> <p><b>Experience in achieving financial close/ and final investment decisions (FID), Project and corporate finance expertise, Understanding and knowledge of financial modelling and ability to develop and interrogate financial models and PPP structuring and procurement:</b></p> <ul style="list-style-type: none"> <li>• 3 points = 5 projects and above</li> <li>• 2 points = 3 projects and above</li> <li>• 1 point = 1 project and above</li> <li>• 0 = no experience in developing sustainable transport projects and model</li> </ul>	<p>4</p> <p>3</p>

	<p>to develop and interrogate financial models</p> <ul style="list-style-type: none"> <li>- PPP structuring and procurement</li> <li>- Knowledge of PPP Regulations</li> <li>- Leads negotiations on commercial/financial matters</li> </ul> <p>List of all relevant projects undertaken and role played must be included in the CV. Use CV Template in Annexure 1.</p>		
<b>1.5</b>	<b>ESG and Gender Expert</b>	<b>Scoring</b>	<b>6</b>
	1.5.1 Honours in Environmental Science/ Social Science or equivalent qualification	<ul style="list-style-type: none"> <li>• 2 points = Honours Degree and above</li> <li>• 0 = Irrelevant Qualifications or non-submission of certified copy of Qualifications and/or SAQA certificate</li> </ul>	2
	<p>1.5.2 Must have at least 7 years of relevant experience in environmental aspects applicable to the transport sector including experience in planning and implementing climate adaptation and mitigation projects, permitting processes, and policy development</p> <p>Should be able to perform gender analysis in the public transport sector</p> <p>List of all relevant projects undertaken and role played must be included in the CV. Use CV Template in Annexure 1</p>	<p><b>Years of Experience Points:</b></p> <ul style="list-style-type: none"> <li>• 2 points = 10 years and above</li> <li>• 1 point = 7 years and above</li> <li>• 0 = No relevant or related experience</li> </ul> <p><b>Experience in environmental aspects applicable to the transport sector including experience in planning and implementing climate adaptation and mitigation projects, permitting processes, and policy development</b></p> <ul style="list-style-type: none"> <li>• 2 points = 3 projects and above</li> <li>• 1 point = 2 projects</li> <li>• 0 point = 1 project and below</li> </ul> <p><b>Include certified proof of qualification</b></p>	<p>2</p> <p>2</p>
<b>1.6</b>	<b>Economic Expert</b>	<b>Scoring</b>	<b>6</b>
	1.6.1 Economic Analysis Specialist with a minimum Degree in Development Finance, Economics, Econometrics, Statistics or related field or any quantitative Degree	<ul style="list-style-type: none"> <li>• 2 points = Masters and above (NQF 9)</li> <li>• 1 point = Honours Degree</li> <li>• 0 = Irrelevant Qualifications or non-submission of certified copy of Qualifications and/or SAQA Certificate</li> </ul> <p><b>Include certified proof of qualification</b></p>	2
	1.6.2 Demonstrable experience and understanding of undertaking Cost Benefit Analysis (CBA) and Cost Effectiveness Analysis (CEA) on infrastructure projects: Expertise in converting financial values into economic values through the use of conversion	<p><b>Years of Experience Points:</b></p> <ul style="list-style-type: none"> <li>• 2 points = 10 years and above</li> <li>• 1 point = 7 years and above</li> <li>• 0 = No relevant or related experience</li> </ul>	2

	<p>factors; and ability to calculate economic performance indicators such as the Economic NPV, Economic RR, and Cost Effectiveness Ratios (CER); ability to demonstrate the distributional impact(s) in relation to the accrual of gains or losses to different stakeholder groups from the implementation of the project.</p> <p>List of all relevant projects undertaken and role played must be included in the CV. Use CV Template in Annexure 1</p>	<p><b>Experience and understanding of undertaking Cost Benefit Analysis (CBA) and Cost Effectiveness Analysis (CEA) on infrastructure projects :</b></p> <ul style="list-style-type: none"> <li>• 2 points = 3 projects and above</li> <li>• 1 point = 2 projects</li> <li>• 0 point = 1 project and below</li> </ul>	2
<b>2.</b>	<b>PROJECT COMPREHENSION, APPROACH AND METHODOLOGY</b>	<b>SCORING</b>	<b>30</b>
<b>2.1</b>	<p><b>Comprehension, Approach, and Methodology:</b></p> <p><b>The proposal:</b></p> <ul style="list-style-type: none"> <li>- Demonstrates a thorough understanding of Terms of Reference (TOR) and transport projects. Demonstrate experience in undertaking feasibility studies in the transport sector, procurement of public transport infrastructure, and PPP. (10 points)</li> <li>- Shows a clear analysis of key challenges and risks associated with the assignment and provides proposals to address each of these. (3 points);</li> <li>- Demonstrate innovative approach, and provide suggested amendments, additions, or improvements to the proposed scope. (2 points)</li> <li>- Establish a work plan and timelines (Gantt Chart) for the execution of the scope. (2 points)</li> <li>- Developing similar studies in other countries i.e. International experience. ( 5 points)</li> <li>- Demonstration of staffing proposal in line with requirements of the Terms of Reference and methodology</li> </ul>	<p><b>Points:</b></p> <p><b><u>Full understanding of methodology = 30 POINTS</u></b></p> <p>Addresses all requirements, demonstrates a sound understanding of assignment, associated risks and included value add innovations</p> <p><b><u>Satisfactory understating of methodology = 20 POINTS</u></b></p> <p>Addresses all requirements, demonstrates a sound understanding of assignment, associated risks, however, did not include value-add innovations or improvements on the scope:</p> <p><b><u>Basic methodology i.e. proposal not innovative = 10 POINTS</u></b></p> <p>Addresses most areas of requirements but is generic and does not convey an understanding of assignment and associated risks:</p> <p><b><u>0 POINTS</u></b></p> <p>Partially addresses requirements, but overall is not convincing (i.e., scope is not fully addressed, or schedule and timeframes are not reasonable); or</p>	30

	<p>proposed by the bidder plus a team organogram detailing the experience and roles of key personnel and supporting team members. (4 points)</p> <ul style="list-style-type: none"> <li>- The lead experts must be supported by the team with at least experience in Mechanical Engineering, ICT, Traffic Engineering, Stakeholder management, Marketing and communication, and Change management. (4 Points)</li> </ul> <p><i>Staffing proposal must offer concrete steps to ensure meaningful participation of members of the team, including mentoring, training, and skills transfer within the team</i></p>	<p>Does not address the requirement and is not detailed:</p> <p>The requirements are not addressed</p>	
<b>3.</b>	<b>BIDDER'S EXPERIENCE</b>	<b>SCORING</b>	<b>20</b>
<b>3.1</b>	<p>The Transaction Advisor or Consortium must demonstrate proven experience in achieving final investment decisions (FIDs) and implementation in public transport.</p>	<p>10 points = Projects worth above R 1 billion or equivalent foreign currency</p> <p>8 points = Projects worth above R 500 million to R 1 billion or equivalent foreign currency</p> <p>7 points = Projects worth above R 350 million to R 500 million or equivalent foreign currency</p> <p>5 points = Projects worth above R 250 million to R 350 million or equivalent foreign currency</p> <p>2 points = Projects worth R 100 million to R 250 million or equivalent foreign currency</p> <p>0 point = Projects worth less than R 100 million</p>	10

3.2	<p>The Company must provide projects where work of a similar nature (preparation, design, and structuring of public transport projects, procurement of public infrastructure including PPPs, etc.) has been completed:</p> <p>Include the name of the client, project duration, value, and client references in Annexure 2</p>	<p>10 points = Five (5) projects and above 7 points = Four (4) projects 5 points = Three (3) projects 1 point = Two (2) projects 0 point = One (1) project and below</p>	10
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## 9. SUBCONTRACTING

The Bidder may subcontract part of the services as stipulated in the Eligibility Criteria, subject to the following conditions:

- it is the responsibility of the lead Bidder to select competent subcontractors that possess the expertise stipulated in these Terms of Reference;
- the Bidder shall be responsible for all due diligence of the selected subcontractors and will be held liable for any non-performance of the subcontractor;
- no separate contract shall be entered into between the SANEDI and any such subcontractors. Copies of the signed agreements between the relevant parties must be attached to the proposal responses; and
- the lead Bidder is required to provide documentation (such as BBBEE Certificate/Sworn Affidavit, Valid or Active Tax Compliance Status Pin Issued by SARS, CSD Summary Report, Valid or Active CIDB Certificate etc.) for the relevant subcontractor as a minimum in support of the subcontracting arrangement (in the case of subcontracting of natural person(s) this requirement shall not apply).

## 10. PRICING PROPOSAL

- **This assignment will be a fixed-price contract.** Accordingly, the Transaction Advisor is required to propose pricing on a lump sum basis, breaking the fixed rate to provide transparency and allow SANEDI to understand how the rate was determined. **Present the fixed rate as specified in Annexure 3**
- The pricing offer will be binding upon acceptance by SANEDI. Nonetheless, SANEDI reserves the right to negotiate the pricing offer with the preferred bidder.
- The short descriptions given in the schedules (see ANNEXURE 3) are brief descriptions used to identify the services and related cost items for which prices are required. Detailed descriptions of the services to be priced are provided in the ToR.
- While it is entirely at the Bidder's discretion with regards to pricing the services, the Bidder is expected to price all the services and associated tasks and activities realistically as to be able to achieve all the deliverables listed in the ToR in a cost-effective and time-efficient manner.

- A rate, sum, professional fee and/or price as applicable, is to be entered against each item in the schedules. An item against which no price is entered will be considered to be covered by the other prices or rates in the relevant Table of Quantities.
- The rates, sums, professional fee and prices in the schedules are to be fully inclusive prices for the work described under the several items. Such prices and rates are to cover all costs and expenses that may be required in and for the execution of the work described in accordance with the provisions of the ToR, and shall cover the cost of all general risks, liabilities, and obligations set forth or implied in the ToR, as well as overhead charges and profit shall cover the cost of all general risks, liabilities, and obligations set forth or implied in the ToR, as well as overhead charges and profit.
- It is anticipated that the price will comprise professional or technical services fees only (mainly milestone related) and associated operational costs (e.g. travel, printing/copying, etc.). The successful bidder will be required to travel or visit projects sites (the Cities) in order to have a thorough understanding of the scope. Therefore, the pricing proposal, should make allowance to visit the site regularly, with a minimum of two (2) visits in the planning stage.
- Bidders are kindly cautioned that the pricing proposal should be submitted in A SEPARATE FOLDER clearly marked "pricing proposal". The proposal should not be combined with any of the other submissions, including the resource matrix, CVs, project reference list, methodology and approach proposal because these qualitative and other criteria are sought to be assessed independently of the pricing proposal. **BIDDERS WHO FAIL TO SUBMIT THEIR PRICING PROPOSAL IN A SEPARATE FOLDER MAY FACE DISQUALIFICATION FROM THE PROCESS.**
- We further recommend keeping the preliminary stage pricing below 10% and ensuring that the combined deliverables at the closing stage are not less than 10%. The pricing per stage should further be split per deliverable in that stage.
- **IT IS IMPORTANT TO NOTE THAT SANEDI CAN CANCEL OR AMEND OR PARTIALLY AWARD THE CONTRACT ACCORDING TO ITS REQUIREMENTS.**

Therefore, the price offer should be all-inclusive

## 11. PAYMENT STRUCTURE

Payment of the services under this RFP will be made in terms of Table 6 below

**Table 6: Payment of Services**

No.	Deliverable	Fee %	Means of verification
1.	Inception report	5%	Approved inception report by PSC
2.	Gap analysis	5%	Approved gap analysis report by PSC and presentation to the Cities
3.	Legal & regulatory analysis report including draft policies	15%	Presentation to the Cities and DTIC, DMRE, DoT Approved by PSC and endorsed by DTIC and the Cities.
4.	Technical Analysis report	15%	Presentation to the cities and report approved by PSC

No.	Deliverable	Fee %	Means of verification
5.	Environmental & socio-economic report	5%	Presentation to the cities and report approved by PSC
6.	Financial analysis report including financial lenders case financial model	5%	Presentation to the cities and approved by PSC
7.	Implementation Plan	5%	Approved by the Cities and the PSC
8.	Comprehensive feasibility study	10%	Approved PSC and accepted by the DBSA
9.	Monitoring of the Pilot phase	5%	Final monitoring report signed off by the Cities & approved by the PSC
10.	Standardization of documents (procurement documents, operating and maintenance templates etc.)	10%	Approved by the Cities & PSC
11.	Bankable feasibility study for the two cities	10%	Presented to the Cities & Approved by the PSC
12.	Business case for scale up	10%	Presented to the Cities & Approved by the PSC and presentation to GEF
	Total	100%	

## 12. CONDITIONS OF AWARD

The following award conditions are applicable:

- The successful bidder will be required to enter into a services agreement in line with SANEDI on such terms as will be specified at the contracting stage.
- The Transaction Advisor will report to the SANEDI Project Lead and may, from time to time, be required to present and submit progress reports within stipulated timeframes. The Transaction Advisor will be expected to confirm professional indemnity cover for the active duration of the assignment.
- The services agreement will provide for the process to be followed for the approval and payment of invoices, and the approval or adoption of deliverables, which will be based on the SANEDI's management of payment and approval processes for similar services.
- The Transaction Advisor will be required to liaise with and disclose information to key Stakeholders involved in the project including, the Cities, DBSA, DTIC, DoT, etc. Furthermore, the TA will be required to attend meetings as and when required and to make various presentations to the relevant project governance structure(s).
- The professionals allocated by the Transaction Advisor to the assignment shall remain on the assignment unless permission is granted in writing by SANEDI to change dedicated professionals which shall be replaced by an individual with similar qualification and experience. Such permission will only be granted in exceptional circumstances.
- Intellectual property developed as a consequence of the Transaction Advisor's work on the assignment will vest in the DBSA and SANEDI.
- The services agreement will provide for the protection of confidential information, which will be based on the SANEDI's terms and conditions for similar agreements.
- The costs of preparing proposals and negotiating the contract are not reimbursable;

- SANEDI is not obligated to accept any of the proposals submitted and reserves the right to negotiate the price with the preferred bidder;
- The Transaction Advisor shall be precluded from undertaking any work or providing any services to any bidding consortium or members of such a consortium and/or the private party or to any eventual project that may result, directly or indirectly from these Services;
- SANEDI will not accept any late bid submissions. Bidders may not contact SANEDI or any participant on any matter pertaining to their bid from the time when bids are submitted to the time the contract is awarded. Any efforts by a bidder to influence bid evaluation, bid comparisons or bid award decisions in any manner, will result in rejection of the bid.
- It is the responsibility of the bidder to ensure that soft copies of documents are provided in formats that are supported by Adobe Acrobat®. All bids, or parts thereof, which cannot be opened will not be evaluated.
- SANEDI reserves the right to change any information in, or to issue an addendum to this document before the closing time. SANEDI and its officers, employees and advisors will not be liable in connection with either the exercise of, or failure to exercise this right. Should the SANEDI exercise its right to change information, it may seek amended responses from all bidders.

The above list of conditions is not exhaustive. The listed conditions are highlighted with the primary purpose of indicating that conditions will be applicable to the award. SANEDI reserves the right to attach further conditions to the award

## **13. PREFERENCE POINTS**

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

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

#### **13.1 General Condition**

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

13.1.2 Preference Points applicable:

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

13.1.3 Points for this tender shall be awarded for:

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

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

	<b>POINTS</b>
Price	80
Specific Goals	20
<b>Total points for price and specific goals</b>	<b>100</b>

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

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

## **14. DEFINITIONS**

- (a) “tender” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “price” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

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

## 15. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

### 15.1. POINTS AWARDED FOR PRICE

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

## 16. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

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

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

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

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

## 17. DECLARATION WITH REGARD TO COMPANY/FIRM

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

17.2 Company registration number:.....

17.3 TYPE OF COMPANY/FIRM

Type of Firm	Tick the applicable box here
Partnership/Joint Venture/ Consortium	
One-person business/sole propriety	
Close corporation	

Public Company	
Personal Liability Company	
(Pty) Limited	
Non -Profit Company	
State Owned Company	

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
  - (e) forward the matter for criminal prosecution, if deemed necessary.

.....  
**SIGNATURE(S) OF TENDERER(S)**

**SURNAME AND NAME:** .....

**DATE:** .....

**ADDRESS:** .....

.....

.....

.....

## Annexure 1: C.V and Projects Undertaken Formats

**Table 7: C.V. Template**

CV Template		
Proposed resource Information		
Proposed Position as per the TOR		
Name of the Firm		
Date of Employment		
Name of the staff member		
Date of birth		
Nationality		
Education		
Date Obtained	Institution	Degrees (s) Obtained and National Qualification Level

Experience				
Employment History Date i.e. (2000 – 2012)	Position Held	Company Name	Detail description in line with the criteria	Sector Experience

Key Projects Undertaken 1	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project features	
Positions Held	
Project Value in ZAR	
Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	
Key Projects Undertaken 2	

Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project features	
Positions Held	
Project Value in ZAR	
Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	
Key Projects Undertaken 3	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project features	
Positions Held	
Project Value in ZAR	
Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	
Key Projects Undertaken 4	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project features	
Positions Held	
Project Value in ZAR	

Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	
Key Projects Undertaken 5	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project features	
Positions Held	
Project Value in ZAR	
Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	

## Annexure 2: Company Experience

**Table 8: Company Experience**

Key Projects Undertaken 1	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project Features	
Project Value in ZAR	
Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	
Key Projects Undertaken 2	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project Features	
Project Value in ZAR	
Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	
Key Projects Undertaken 3	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project features	
Project Value in ZAR	

Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	
Key Projects Undertaken 4	
Name of the Assignment / Project	
Period	
Location	
Client	
Sector	
Main Project Features	
Project Value in ZAR	
Has the project reached Financial close (Yes / No)	
Date of Financial close	
Activities Performed	

### Annexure 3: Fees and assumption

**Table 9: Pricing Schedule**

Item	Tasks as per ToR	Key deliverables as per ToR	Resources required (number)	Estimated manhours (hours)	Total cost (ZAR)
1.	Project Implementation Plan	Inception report			
2.	e-Mobility Gap Analysis	Gap Analysis Report			
3.	Technical Advisory services	Technical advisory report (technical options analysis, charging infrastructure options analysis, risks etc.)			
		Report on design specifications			
4.	Economic analysis	Economic study report			
5.	Legal advisory services	Legal advisory report			
		Policy development			
6.	Financial viability	Financial advisory report			
	Development of a financial plan				
	Development of a financial model				
7.	Environmental Advisory	Comprehensive Environmental social assessment report and			

		stakeholder engagement report			
8.	Comprehensive Feasibility for pilot	Comprehensive Feasibility Study Report			
9.	Procurement of electric buses	Procurement documents, including tools and template			
10.	Standardization of processes and documentation	Design, develop, and produce, standard documents, and harmonized processes to support the financing and implementation of electric buses in the cities			
		Develop and produce monitoring/tracking and data collation tools			
		Design a knowledge hub			
11.	TA Services	BFS / Business Case for Scale-up			
12.	Project management	Project Management fees			
13.	Contingency				
<b>Total</b>					
<b>VAT</b>					
<b>SUB-TOTAL</b>					

## FORM OF OFFER AND ACCEPTANCE (AGREEMENT)

### FORM OF OFFER

#### THE CONSULTANT IS TO COMPLETE AND SIGN THE FORM OF OFFER

The Employer, identified in the Acceptance signature block, has solicited offers to enter into a contract in respect of the following services:

#### **RFP no 2224: TRANSACTION ADVISORY TO DEVELOP THE ELECTRIC MOBILITY PROJECT IN SOUTH AFRICA**

The Tenderer, identified in the Offer signature block below, has examined the documents listed in the Tender Data and addenda thereto as listed in the Tender Schedules, and by submitting this Offer has accepted the Conditions of Tender.

By the representative of the Tenderer, deemed to be duly authorised, signing this part of this Form of Offer and Acceptance, the Tenderer offers to perform all of the obligations and liabilities of the consultant under the Contract including compliance with all its terms and conditions according to their true intent and meaning for an amount to be determined in accordance with the Conditions of Contract identified in the Contract Data.

THE OFFERED TOTAL OF THE PRICES INCLUSIVE OF VALUE ADDED TAX IS

\_\_\_\_\_ (in words);                      ZAR \_\_\_\_\_ (in figures),

This offer may be accepted by the SANEDI by signing the Acceptance part of this Form of Offer and Acceptance and returning one copy of this document to the Tenderer before the end of the period of validity stated in the Tender Data, whereupon the Tenderer becomes the party named as the consultant in the Conditions of Contract identified in the Contract Data.

**Signature(s)** \_\_\_\_\_

**Name(s)** \_\_\_\_\_

**Capacity** \_\_\_\_\_

**For the *Tenderer*** \_\_\_\_\_  
**(Name and address of organisation)**

**Name and  
signature of  
witness** \_\_\_\_\_ **Date** \_\_\_\_\_

## 18. RETURNABLE SCHEDULES

### 19. Bidder's Declaration of Interest

#### BIDDER'S DISCLOSURE

##### THE DECLARATION FORM

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

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

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

**YES/NO**

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

Full Name	Identity Number	Name of State institution


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

20.2.1 If so, furnish particulars:

.....  
.....

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

20.3.1 If so, furnish particulars:

.....  
.....

## 20. DECLARATION

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

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

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

21.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>1</sup> will not be construed as collusive bidding.

<sup>1</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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

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

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

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

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

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

.....

Signature

Date

.....

name).....

## 21. CERTIFICATE OF ACCEPTANCE – GENERAL CONDITIONS OF CONTRACT

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

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

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....

## 22. DECLARATION OF ACCEPTANCE – BID EVALUATION CRITERIA

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

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

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....

## 23. DECLARATION OF UNDERSTANDING – SCOPE OF WORKS

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

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

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....

<p><b>AMOUNT IN WORDS</b></p> <p>To be carried forward to Section 8 Form of Tender <b>BID 2224</b></p> <p>.....</p> <p><b>SIGNATURE OF BIDDER</b></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 .....

## 24. FORM OF TENDER

i)	<p><b><u>Conditions of Acceptance</u></b></p> <ul style="list-style-type: none"> <li>▪ The Tenderer is required to complete this FORM of TENDER in every respect, and tenders will not be considered unless this FORM of TENDER is completed in every particular and each page is initialled by the tenderer and fully signed on this page.</li> <li>▪ This Form of Tender shall be completed by the tenderer in black ink and no corrections, use of correcting fluids or any alterations will be permitted.</li> <li>▪ The FORM of TENDER and price schedules shall be stated in South African Rand (ZAR) and the price indicated on the schedules shall be binding on the tenderer, and no exception shall be made for omissions, casting errors or errors of whatsoever nature.</li> <li>▪ Where a tenderer is not returning a price for a line item, or costs associated with that line item are included in another line item, the tendered shall endorse that line item with the words, “No Cost” or “incorporated in Item (NO.....)” whichever being applicable.</li> </ul>
ii)	<p><b><u>Confidentiality</u></b></p> <p>All information pertaining to the services acquired by <b>SANEDI</b> from the service provider or furnished to the service provider shall be treated as confidential by the service provider and shall not be used or furnished to any other person other than for the purposes of the services without the written Consent of the Accounting Officer unless such information is or later becomes public knowledge, other than by breach of the afore-going.</p>
iii)	<p>The service provider shall ensure that all its officers, employees, agents or subcontractors treat all information relating to the services as confidential.</p>
iv)	<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>
v)	<p>Failure by the service provider to comply with the provisions of this Clause shall constitute a material breach of the contract and shall constitute a ground for termination of the contract by <b>SANEDI</b>, by giving the service provider thirty days’ notice.</p>
vi)	<p><b><u>Priced Proposal</u></b></p> <p>The Bid is a <b><u>FIXED PRICE PROPOSAL</u></b> and clause 48 shall apply. Clause 49 is not applicable.</p>
vii)	<p><b><u>FIXED PRICE PROPOSAL</u></b></p> <p>The price quoted in the pricing schedule and returned in the Form of Tender is returned as a <b>FIXED PRICE PROPOSAL</b> valid for a period of contract and is not subject to cost price escalations, foreign currency variation or additionality as agreed in the Conditions of Contract</p>

viii)	The Bidder is advised that SANEDI will remit the appointed service provider directly and shall be required to comply with all remittance requirements stipulated in the Conditions of Contract specific to this appointment.
ix)	The Bidder is advised to plan and provide for all possible risks that may affect the delivery project on time and what mechanisms are in place to manage such risks.
x)	We/I the undersigned, who warrants that they are duly authorised to do so on behalf of the enterprise, confirms that the contents of the conditions of acceptance pertaining to the FORM of TENDER are acceptable, and having fully understood the scope of works and conditions of bidding, herewith warrant that We/I have satisfied ourselves as to the correctness and sufficiency of the rates and prices set out in the Schedule and therefore offer the following PRICE and offer to undertake the works in accordance with the standards and specifications required.
xi)	The undersigned, who warrants that he / she is duly authorised to do so on behalf of the enterprise, confirms that this Form of Tender is submitted in good faith, free of corrections, alterations or encumbrances and such price is binding on the enterprise for a period of 90 days from date of tender close and may be extended by mutual agreement between the parties for a further period of 90 days thereafter.
xii)	We/I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the goods and/or works specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
xiii)	We/I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents to SANEDI in accordance with the requirements and specifications stipulated in bid number 2224 at the price/s quoted. This offer remains binding and open for acceptance by the purchaser during the validity period indicated and calculated from the closing time of bid.
xiv)	We/I hereby undertake to supply all or any of the goods and/or works described in the attached bidding documents in accordance with the SANEDI STANDARD CONDITIONS OF CONTRACT pertaining to the supply of goods and services.  The Bidder is advised to familiarise themselves with the SANEDI STANDARD CONDITIONS OF CONTRACT pertaining to the supply of goods and services which can be viewed on the SANEDI Website at <a href="http://www.SANEDI.ORG.ZA">www.SANEDI.ORG.ZA</a>
xv)	We/I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfilment of this contract.
xvi)	We/I declare that we/I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.

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

Warrants that I am duly authorised to do so on behalf of the enterprise, and confirm that the Bid submitted has been checked and all prices shown are full and final, and inclusive of all taxes, levies, duties and encumbrances, and shall remain valid for a period of 90 days from date of Quotation Closure as depicted in the Submission Data Section of this Bid Document

Therefore our TOTAL Tender Price in respect of the Goods and Services requested under this Call for Proposals (BID REF 2224) 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

Amount in Words .....

.....

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....