

**BID NUMBER: DOE**

**The Republic of South Africa**

**Department of Energy**

**TERMS OF REFERENCE (ToRs) FOR THE REQUEST FOR BIDS FROM  
QUALIFIED SERVICE PROVIDERS FOR THE INSTALLATION OF SOLAR  
WATER HEATER ALSO REFERRED TO AS SOLAR GEYSERS IN THE  
PARTICIPATING MUNICIPALITIES FOR 2018/19 FINANCIAL YEAR UNDER THE  
SOCIAL COMPONENT OF THE NATIONAL SOLAR WATER HEATER  
PROGRAMME FOR A PERIOD OF SIX (6) MONTHS**

**LIST OF DOCUMENTS COMPRISING THE RFB AS ANNEXURES**

**ANNEXURE A: LIST OF APPROVED MUNICIPALITIES**

**ANNEXURE B: SPREADSHEET FOR TRAINEES**

**ANNEXURE C: WARRANTY EXTRACT FROM THE SUPPLY  
AGREEMENT BETWEEN THE DEPARTMENT OF  
ENERGY AND CONTRACTED SUPPLIERS**

## **GENERAL REQUIREMENTS, RULES AND PROVISIONS**

### **1. Disclaimer**

- 1.1. While all reasonable care has been taken in preparing this RFB, the information contained in it does not purport to be comprehensive or to have been verified by the Department or any other department of the Government, any of its officers, employees, servants, agents, advisors or any other Person. Accordingly, neither the Department nor any of its advisors accept any liability or responsibility for the adequacy, accuracy or completeness of any of the information or opinions stated herein.
- 1.2. Save where expressly stipulated otherwise, no representation or warranty (whether express or implied) is or will be given by the Department or any of its officers, employees, servants, agents, advisors or any other Person with respect to the information or opinions contained in this RFB, or in relation to any Briefing Notes issued in relation to this RFB or the National Solar Water Heater Programme in particular the Installation Phase and other related phases of this programme.
- 1.3. The Department reserves the right to amend, modify or withdraw this RFB or any part of it, or to terminate or amend any of the procedures, procurement processes or requirements detailed in this RFB during the conduct of the National Solar Water Heater Programme and /or the Installation Phase, at any time, without prior notice and without liability to compensate or reimburse any Person pursuant to such amendment, modification, withdrawal or termination.
- 1.4. The Department reserves the right to terminate or amend or extend the National Solar Water Heater Programme and /or the Installation Phase at any time, without prior notice and without liability to compensate or reimburse any Person pursuant to such termination or amendment or extension.
- 1.5. The terms and conditions set out in this RFB are stipulated for the express benefit of the Department and, save as expressly stated to the contrary, may be waived

at the Department's sole discretion at any time. The Department reserves the right to adopt any proposal made by any Person responding to this RFB at any time and to include such proposal in any documents which may or may not be made available at any stage of the National Solar Water Heater Programme and /or the Installation Phase to any other Persons responding to this RFB, without the obligation or liability to pay any compensation or reimbursement of any nature to any Person pursuant to such adoption.

- 1.6. This RFB is provided solely for the purpose set out in this document and is not intended to form any part or basis of any investment decisions by the Bidder. Each Person to whom this RFB is made available must make its own independent assessment of the National Solar Water Heater Programme and /or the Installation Phase, taking such advice (whether professional or otherwise) as it deems necessary.
- 1.7. The Department had in the beginning engaged Transaction Advisors in respect of the preparation for the Implementation of the National Solar Water Heater Programme including the Installation Phase and this RFB, who then acted solely as advisors to the Department to assist the Department in the National Solar Water Heater Programme. However, this RFB for the Installation Phase was finalised exclusively by the Department and, accordingly, will not be responsible or owe a duty of care to any Person other than the Department in respect of this RFB, the National Solar Water Heater Programme or the Installation Phase. The officials of the Department shall not, nor shall any legal advisor, or advisor to the Department in relation to the National Solar Water Heater Programme or in particular the Installation Phase or this RFB, provide any opinion to or for the benefit of any, Bidder or its shareholders in their capacity as advisor to the Department.
- 1.8. No Bidder or its shareholders shall have any claim against the Department, its officers, employees, servants, agents or Transaction Advisors, under any circumstances whatsoever, arising out of any matter relating to the National Solar Water Heater Programme, the Installation Programme or this RFB of any nature whatsoever, including where such claim is based on any act or omission by

the Department, or any of its officers, employees, servants, agents or Transactions Advisors of any nature whatsoever, or where such claim is based on the content of, or any omission from, this document of any nature whatsoever.

- 1.9. This RFB does not constitute an offer to enter into a contractual relationship with any Bidder, but is merely a solicitation of Bid Responses to enable the Department to select the Preferred Bidders or Service Providers in order to conclude Installation Service Level Agreements with the selected Preferred Bidders.

## 2. Definitions and Interpretation

- 2.1. In this RFB, the following terms shall have the following meanings:

- 2.1.1 **"Advisors"**- any advisors to the Bidders or any other participants in any Bid Response;
- 2.1.2 **"Baseline System"**- a solar water heater system with a capacity ranging from 80 (eighty) litres to 150 (one hundred and fifty) litres, together with any and all associated components and equipment, and that complies with the minimum technical standards, specifications and requirements set out in the Supply Programme;
- 2.1.3 **"B-BBEE"**- Broad-Based Black Economic Empowerment as defined in section 1 of the B-BBEE Act;
- 2.1.4 **"B-BBEE Codes"**- the Department of Trade and Industry Broad-Based Black Economic Empowerment Codes of Good Practice of 2013 issued in terms of section 9 of the B- BBEE Act;
- 2.1.5 **"B-BBEE Scorecard"**- the B-BBEE generic scorecard as per the B-BBEE Codes;

- 2.1.6 **"B-BBEE Verification Certificate"**- a B-BBEE certificate issued by a Verification Agency as measured against the B-BBEE Scorecard or Sector Specific Scorecard, as the case may be;
- 2.1.7 **"Bidder"**- is a Company and the entity that submits a Bid Response and that will enter into the Installation Service Level Agreement, if awarded Preferred Bidder status;
- 2.1.8 **"Bid Submission Date"**- the date identified as the bid submission date or closing date;
- 2.1.9 **"Briefing Note"**- any document issued in writing by the Department that amends or supplements this RFB in any way. These briefing notes shall be consecutively numbered in the order in which they are issued;
- 2.1.10 **"Business Day"**- a day other than a Saturday, Sunday or official public holiday in the Republic of South Africa;
- 2.1.11 **"Company"**- a private or public (*whether or not listed*) company, incorporated in the Republic of South Africa in terms of the Companies Act;
- 2.1.12 **"Compliant Bid"**- a Bid Response that satisfies the Compliance and Functionality Criteria, and "Compliant Bidder" shall have a corresponding meaning;
- 2.1.13 **"Contributor Status Level"**- has the meaning ascribed to the definition of "8-BBEE Status Level of Contributor" in the PPPFA Regulations;
- 2.1.14 **"Delivery"**- has the meaning given to it in the Installation Agreement;

- 2.1.15 **"Department or DoE "-** the Department of Energy of the Government of the Republic of South Africa or any successor department designated by the Government of the Republic of South Africa from time to time;
- 2.1.16 **"Designated Installation Area" -** a residential area that is identified by the municipality and approved by the Department for purposes of undertaking or procuring the undertaking of the supply, Installation and maintenance of Baseline Systems, in respect of Participating Residential Dwellings;
- 2.1.17 **"DoL"** the National Department of Labour;
- 2.1.18 **"Effective Date"** the date of the last party signing this Agreement;
- 2.1.19 **"EWSETA"** Energy and Water Sector Education Training Authority, as established in terms of the Skills Development Act, 1998 (Act No. 97 of 1998), as amended and reports to the Department of Labour
- 2.1.20 **"Eskom"-** Eskom SOC Limited, a state owned company, duly established in accordance with the laws of the Republic of South Africa;
- 2.1.21 **"Evaluation Criteria"-** the evaluation criteria set out in Part III (Comparative and Competitive Evaluation Criteria) of this RFB;
- 2.1.22 **"Financial Year"-** a period of 12 (twelve) months commencing on 1 April of a given calendar year and ending on 31 March of the following year;
- 2.1.23 **"Framework Agreement"** Agreement entered into between the Department and participating municipalities for the purposes of the National Solar Water Heater roll out in the Designated Installation Areas;

- 2.1.24 **"Government"**- the Government of the Republic of South Africa, and any of its departments, agencies or other entities that it manages or controls;
- 2.1.25 **"Information Session"**- is the compulsory briefing information session set for all the interested bidders to attend in order to qualify to submit a bid response to this RFB;
- 2.1.26 **"Installation Service Level Agreement"**- the Installation Agreement to be entered into between a Company selected as a Preferred Bidder, as the Installation Contractor, and the Department pursuant to the Social Programme of the National Solar Water Heater Programme to carry out the Installation of Baseline Systems and or Solar Geysers in terms of a Installation Plan within the Designated Installation Area in the approved participating municipality;
- 2.1.27 **"Installation Completion Certificate"** - the certificate issued by the Installation Project Manager upon completion of the Installation and successful commissioning of a Baseline System on a Participating Residential Dwelling by the Installation Contractor;
- 2.1.28 **"Installation Assistants"** Trainees identified by Municipalities with the support of the Department of Labour and trained under the SWH Programme through the EWSETA for the purposes of installation on participating Residential Dwellings in approved Municipalities;



- 2.1.29 **"Installation Contractor or Service Provider"**- a Service Provider appointed by the Department pursuant to this procurement process that enters into an Installation Agreement to Install Baseline Systems in terms of a Installation Plan within a Designated Installation Area for purposes of the Social Programme of the National Water Heater Programme;
- 2.1.30 **"Installation Plan"**- the plan that shall be developed by the Department setting out the Designated Installation Areas and the parameters within which the Installation Contractor should carry out its activities;
- 2.1.31 **"Installation Phase"**- this procurement process of the Social Component to appoint Installation Contractors to undertake the Installation of Baseline Systems and or Solar Geysers in terms of an Installation Plan in the Participating Residential Dwellings throughout one or more Designated Installation Areas by installers that will be appointed and managed by the Department of Energy;
- 2.1.32 **"Installation Project Manager"**- the Project Manager appointed by the preferred bidder as part of its approved Project Team to manage and administer the Implementation of National Solar Water Heater Installation of Baseline Systems or Solar Geysers, on behalf of the Department within a Designated Installation Area of an approved participating Municipality by its Installation project teams and or Contractors acting in terms of one or more Installation

- 2.1.33 **"Installer"**- an individual who is used by an Installation Contractor or Service Provider to carry out Installation activities and who may be selected by a Municipality such as the trainees and however managed by the Installation Service Provider as part of the Project Installation Team;
- 2.1.34 **"Lawfully Authorised Occupant"**- an adult Person who is an owner or lessee duly authorised by the owner to authorised by the owner of a Participating Residential Dwelling;
- 2.1.35 **"Minister"**- the Minister of Energy, from time to time;
- 2.1.36 **"Memorandum of Agreements"** Any agreement entered into with any Government Department and or Organ of State for collaborative services required for joint implementation on any of the programme phases for the purposes of the National Solar Water Heater Programme roll out and or implementation.
- 2.1.37 **"National Solar Water Heater Programme"** National Solar Water Heater Programme comprised of Social; Repair and Replace and Load Reduction Components and implemented by or on behalf of the Department of Energy pursuant to the Supply; Training; Technical Feasibility Assessments; Social Facilitation; Installation and maintenance of Solar Water Heater Baseline Systems or Solar Geysers in approved residential homes and or Designated Installation Areas throughout the Republic of South Africa;

- 2.1.38 **NSWHP Website**"- the official web page of the National Solar Water Heater Programme being www.energy.gov.za;
- 2.1.39 **"Person"**- a natural person, partnership, firm, corporation, joint stock company, trust, unincorporated association, joint venture, government body, limited liability company, close corporation, any sphere of government (including national, provincial, regional and local government, or organ of state) or any other legal entity which is considered a legal entity under the laws of South Africa or the country in which such an entity has been formed;
- 2.1.40 **"PFMA"** the Public Finance Management Act No. 1 of 1999;
- 2.1.41 **"PPPFA Regulations"**- the PPPFA Regulations published under GN R502 in *Government Gazette* 34350 of 8 Preferential Procurement Policy Framework Act
- 2.1.42 **"Preferential Procurement Policy Framework Act"**- the Preferential Procurement Policy Framework Act No. 5 of 2000;
- 2.1.43 **"Preferred Bidder"**- any Bidder that is selected pursuant to a Competitive and Comparative *Evaluation Criteria*) of this RFB by the Department as such and which, upon acceptance of such appointment shall, possibly conclude an Installation Service Level Agreement, pursuant to the National Solar Water Heater Programme;

- 2.1.43 **“Price”** the price offered by the Bidder in respect of the full cost of Installation of a Baseline Systems and or a Solar Geysers Systems as per the Installation Service Level Agreement which also covers, *inter alia*, Collection of the Baseline Systems from the Temporary Storage and from the Storage Location to the Designated Installation Area, safe and secure storage at the Designated Installation area pending Installation;
- 2.1.44 **“Project Officer”-** the Person appointed by the Department as the Project Manager in respect of the implementation of the National Solar Water Heater Programme in any of the Phases;
- 2.1.45 **“Rand” or “R”-** South African Rand, the lawful currency of the Republic of South Africa;
- 2.1.46 **“Relevant Authority”** any ministry, agency, authority or organ of state at any level of government or any other government or any other public authority, body, entity or natural Person which has legal jurisdiction under over a Party and/or the National Water Heater Programme;
- 2.1.47 **“RFB”-** this Request for Bid document for the Installation Phase of the Social Component of the National Solar Water Programme and all annexures and other appendices to it and any Briefing Notes issued in respect of it, from time to time;
- 2.1.48 **“SABS”-** the South African Bureau of Standards, which was established by section 2 of the Standards Act No, 24 of 1945 and which continues to exist in terms of section 3 of the Standards Act No.8 of 2008;

- 2.1.49 **"SANS 10106"**- the technical standard issued and published by the SABS Standards Division entitled "The Installation, Maintenance, Repair and Replacement of Domestic Solar Water Heating
- 2.1.50 **"Standard Installation Kit"**- the items of installation material, which will be at the Installation Service Provider's cost but standard Kit issued for free to the Installation Assistants during the Training Phase from which these tools are required for the Installation of a Baseline Systems or Solar Geyser on a Designated Residential Dwelling in standard conditions;
- 2.1.51 **"Sector Specific Scorecard"**- means those codes of good practice that have the same status as the B-BBEE Codes and are fully binding between and among businesses operating in a specific industry, gazetted under section 9(1) of the B- BBEE Act;
- 2.1.52 **"Social Component of the National Solar Water Heater Programme"**- the first-time installation of new solar water heaters in accordance with pre-determined annual, medium- and long term targets and distinguishable from the Repair and Replace Solar Water Heater Programme undertaken by the Central Energy Fund (SOC) Pty Ltd and comprised of the large scale roll-out, supply, training, Installation and maintenance in terms of the National Solar Water Heater Programme of Baseline Systems to Participating Residential Dwellings on a free-issue basis and which are located within municipal residential areas that are selected and identified by participating municipalities and approved by the Department and after having been determined to be technically feasible;

- 2.1.53 **"Supplier"**- a company appointed to supply the Department with Baseline Systems under the separate Supply Programme which is part of the Social Programme of the National Solar Water Heater Programme;
- 2.1.54 **"Termination Date"** the termination date contemplated in sub-clause 8.9.7.1.5.2 of this RFB, unless terminated earlier in terms of this Agreement;
- 2.1.55 **"Treasury Regulations"**the Treasury Regulations published under GN R225 in Government Gazette 27388, 15 March 2005, in terms of section 76(1) of the PFMA;
- 2.1.56 **"Unemployment Insurance Fund or UIF"** Established in terms of the Section 4 (1) of the Unemployment Insurance Act, 2001
- 2.1.57 **"Unemployment Insurance Fund Beneficiary"** (Act No. 63 of 2001); at least 70% of the participants have a record of having contributed into the UIF and at most 30% never contributed into the UIF;
- 2.1.58 **"VAT"** value-added tax levied in terms of the Value-Added Tax Act No. 89 of 1991;

2.2. In this RFB:

2.2.1. references to a statutory provision include any subordinate legislation made from time to time under that provision and include that provision as modified or re-enacted from time to time;

2.2.2. words importing the masculine gender include the feminine and neuter genders and vice versa;

2.2.3. the singular includes the plural and vice versa;

2.2.4. natural Persons include artificial Persons and vice versa;

2.2.5. references to a "subsidiary" or a "holding company" shall be references to a subsidiary or holding company as defined in the Companies Act;

- 2.2.6. if a definition imposes substantive rights and obligations on a Person, such rights and obligations shall be given effect to and shall be enforceable, notwithstanding that they are contained in a definition;
- 2.2.7. any definition, wherever it appears in this RFB, shall bear the same meaning and apply throughout this RFB unless otherwise stated;
- 2.2.8. if there is any conflict between any definitions in this RFB then, for purposes of interpreting any clause of this RFB or paragraph of any volume or Annexe, the definition appearing in that clause or paragraph shall prevail over any other conflicting definition appearing elsewhere in this RFB;
- 2.2.9. unless otherwise specified, all references to any time shall be to the time of day in South Africa.
- 2.2.10. The expiration or termination of this RFB shall not affect such of the provisions of this RFB which are expressly provided to operate after any such expiration or termination, or which of necessity must continue to have effect after such expiration or termination, notwithstanding that the relevant provisions themselves do not provide for this.

### **3. Invitation**

- 3.1. This RFB constitutes a formal invitation to Qualified Bidders to submit their Bid Responses for the Installation of Baseline Systems and or Solar Geysers for the Department of Energy in the Social Component of the National Solar Water Heater Programme.

### **4. Purpose of this RFB**

The purpose of this RFB is:

- 4.1. to set out the rules of participation in the Installation Phase;

- 4.2. to provide further information about the National Solar Water Heater Programme in general and the Installation Phase to Bidders and other interested persons so as to allow them to prepare for participation in the National Solar Water Heater Programme and to prepare comprehensive and competitive Bid Responses pursuant to the Installation Programme;
- 4.3. to give guidance to the Bidders in the preparation of their Bid Responses;
- 4.4. to enable the Department to consider those Bid Responses submitted by Bidders that:
  - 4.4.1. satisfy the technical, financial and legal requirements and meet the criteria described;
  - 4.4.2. fulfil the comparative and competitive evaluation criteria and requirements as detailed in the RFB;
  - 4.4.3. are able to Install the Baseline Systems and or Solar Geysers as envisaged by the Department; and
  - 4.4.4. to enable the Department to select Preferred Bidders.

## **5. Introduction and Background**

- 5.1. In June 2009, the South African Government, through the Department, pronounced through its budget speech its intention to launch a national solar water heater programme. This was done against the backdrop of prevailing national electricity constraints as well as the energy efficiency targets contained in the White Paper and the South African National Energy Efficiency Strategy. At the time, the Minister of Energy set a national target of 1 million installed solar water heaters in the residential and commercial sectors. The national solar water heater programme was subsequently launched in April 2010 and Eskom was appointed as the implementing agent responsible to implement the programme until 2014.



5.2. In May 2015, the Minister of Energy announced the implementation of the revised National Solar Water Heater Programme pursuant to Cabinet consideration as described further below.

## **6. Overview of the National Solar Water Heater Programme**

6.1. In this section, several key features of this National Solar Water Heater Programme are introduced.

6.2. The National Solar Water Heater Programme comprised of three (3) broad streams or components, that is, Social; Repair and Replace; and Load Reduction. The Social Component with respect to the revised Contracting and or Implementation Model is comprised of Procurement, Supply, Training, Installation and Maintenance of solar water heater systems in approved and or participating Residential Dwellings throughout South Africa. The systems are to be supplied, installed and maintained through the Social Programme largely on a free-issue basis.

6.3. The National Development Plan (NDP) sets a target of 5 (five) million installed solar water heaters in residential areas by 2030. The set target is subject to available resources.

6.4. For the purpose of this RFB, the focus is only on the Social Component as explained below:

6.4.1. the Social Programme (i.e. in line with this RFB), in terms of which:

6.4.2. Participating municipalities pursuant the signing of a Framework Agreements (i.e. the signing of Framework Agreements is supported by a Council Resolution) with the guidance from and or criteria set by the Department will identify residential areas which they deem to be a priority and feasible for the Installation of Baseline Systems and or Solar Geysers.

6.4.3. The Department procure the Baseline Systems and or Solar Geysers for Installation in Participating Residential Dwellings within the Designated Installation Areas. It should be highlighted that this procurement of the Baseline

Systems is the subject matter of the separate Supply Phase of the National Solar Water Heater Programme which commenced in December 2015 for a period of three financial years, that is, 2015/16; 2016/17 and 2017/18. To date, of this Supply Phase, 87206 Baseline Systems were procured by the Department and ready for installation. However, 200 Baseline Systems have already been installed in the Pilot Project in Nelson Mandela Bay Municipality by end of June 2018. The main objective of the Pilot Project was to test the feasibility and viability of the revised Contracting and Implementation Model of the Social Component of the National Solar Water Heater Programme from which lessons learnt can enhance the implementation of the broader scale roll of the programme. As indicated above, the systems are to be supplied, installed and maintained through the Social Programme largely on a free-issue basis.

6.4.4. The Department is currently finalising procurement of a panel of Service Providers to undertake Technical Feasibility Assessments (TFAs) of the residential areas identified and submitted by the participating municipalities from based on positive results, the qualifying areas will be named as Designated Installation Areas (DIAs). In addition, the Department is also finalising the procurement of a panel of Service Providers for Social Facilitation from which the Service Providers will conduct community mobilisation in preparation of the programme roll out or implementation. Subsequently, the Service Providers for both TFAs and Social Facilitation will be appointed. The bidders in relation to this RFB should obtain the terms of references regarding both technical feasibility assessment and social facilitation on the Departmental website to familiarise themselves with the work that will be undertaken through this projects since the outcomes of the projects should be taken into account during installations.

6.4.5. This RFB serves to assist the Department to finalise the process of appointing Qualified Service Providers for the Installation of Baseline Systems and or Solar Geysers on Participating Residential Dwellings from which the Service Providers are expected to appoint the Installation Assistants or installers selected and trained from within participating municipalities under the Training

Phase jointly implemented together with the Unemployment Insurance Fund (UIF) Department of Labour (DoL), and Energy and Water Sector Training Agency (EWSETA). It is therefore envisaged that each team of installation will comprise of 4 installations assistants per installation among other members of the Service Provider. **The Contracted Service Provider is expected to complement the R50 per day of stipend from the EWSETA by the same amount.** As such, it is expected that this amount for stipend be included in the quote for this RFB.

- 6.4.6. The Department entered into a Memorandum of Agreement (MoA) with the Unemployment Insurance Fund (UIF) - Department of Labour (DoL), and Energy and Water Sector Training Agency (EWSETA). However, training of the installation assistants is undertaken as a separate procurement under EWSETA as per the above MoA. It has been planned that 2 644 installation assistants will be trained under a separate procurement as indicated above. Attached spreadsheet outlines the minimum number of teams of installation assistants or trainees required per installation (**Annexure B**). The Installation Phase is the subject matter of this RFB.

## **7. Policy Objectives of the National Solar Water Heater Programme**

The Overall Policy Objectives for the NSWH Programme underpinning the implementation of this RFB are to:

- 7.1. Reduce electricity demand from the grid;
- 7.2. Mitigate against adverse climate change;
- 7.3. Cushion the poor against increasing electricity tariffs;
- 7.4. Facilitate the creation of local manufacturing industry;
- 7.5. Create employment opportunities by providing training and develop unemployed citizens through opportunities within the programme;
- 7.6. Skills development through capacity building programme related to the project; and

7.7. Economic empowerment for women, youth and people with disabilities through the business opportunities emanating from the programme.

## **8. Scope of Work for the Installation Phase**

8.1. To respond to the main and specific objectives of the assignment, Service Provider will be expected to thoroughly undertake the following activities. In brief, Qualified Bidders or Service Providers are invited to submit Bid Responses to Install the Baseline Systems and or Solar Geysers for the Department of Energy in Designated Installation Areas and or participating municipalities as per the approved list attached as **Annexure A** of the RFB pursuant to the Social Component of the National Solar Water Heater Programme.

### **8.2. Installation of Procured Baseline Systems**

8.2.1. The Bidders are expected to bid for their participation in this Installation Phase that is envisaged to install the already procured 87 000 Baseline Systems and or Solar Geysers by the Department of Energy. In short, the number of procured Baseline Systems will therefore translate into the number of Residential Dwellings in the approved participating municipalities. A list of approved municipalities and their respective allocations forms part of this RFB attached as **Annexure A**. The service providers will later be provided with beneficiary lists as compiled by the municipalities for the participating Residential Dwellings within the Designated Installation Areas. For the purposes of this RFB, the Bidders are required to focus on the number of the procured Baseline Systems that automatically translates into the number of beneficiary households.

8.2.2. Use the existing documents in addition to this RFB document such as all the relevant South African National Technical Standards for installation of Hot Water accessible from the South African Bureau of Standards at the Bidders costs and related annexures for guidance to respond to this Bid which should comprise of both the technical and financial parts for the installation of Baseline Systems or Solar Geysers to provide a detailed Methodology and an Installation Plan to roll out the installation of Baseline Systems or Solar Geysers in respective participating municipalities. The Methodology should also include the

proposed “Complaints or Queries handling approach (i.e. both technical and general in nature) on any related matter from the beneficiaries or end users or any person point along the installation value chain leading to the matter being resolved”. The Queries’ handling methodology should outline how queries should be registered, tracked and monitored to its finalisation by both the participating Municipality through a nominated or authorised official and the Department through the Project Officer.

- 8.2.3. To outline the proposed Project Team Structure comprised of Qualified Members for installation taking into consideration the compulsory hiring of additional trained Installation Assistants or Installers as per **Annexure B** of the trained Installation Assistants under the Training Phase as explained above. It should be indicated that the Training Phase forms a major part of the Social Component of the National Solar Water Heater Programme based on the lessons learnt from the previous installation phase (i.e. 2009 – 2014) when the programme commenced and implemented under Eskom SOC Limited. The objective of the Training Phase is to ensure that all contracted Installers or Service Providers are thoroughly trained by accredited Training Service Providers or Institutions in an effort to prevent any potential poor workmanship which may result in reducing the efficiency of the solar geysers or performance and ultimately leading to dysfunctional systems.
- 8.2.4. The Project Team structure should also provide details of installation site offices that include the provision of secure storage of the Baseline Systems from the point of collection from storage at the time when the systems are under its custody. It should be indicated that municipalities have been requested to provide secure storage from which the appointed or contracted Qualified Installers will be expected to manage the security and dispatching of the Baseline Systems from handover process by the Department and the Municipality. The secure storage provided by Municipalities will be inspected and signed off by the Department. In addition, it should be indicated the contracted Service Provider will be expected to provide security of the Systems

in their possession from collection to installation. Bidders should take this in consideration during the pricing of their respective Bids.

8.2.5. It should be indicated that the Qualified Service Providers will be expected to nominate and avail key installation officials or Installers to be trained by the contracted Suppliers by the Department under the Supply Agreement for the Manufacturing, Supply, Delivery and Storage of the Solar Water Heater Programme in an effort to ensure that all the Installers are familiar and conversant with the type of technology they are expected to install in the participating Residential Dwellings of the Designated Installation Areas. In brief, the contracted Installers will be provided with a “Product Specific Training” at the Department’s cost to further complement the skills and experience that Project Teams have declared in their Bids and bring to the project. The Department will provide the details of the product specific training once the appointment of qualified installers has been concluded. The training will take almost a week and half.

8.2.6. **All Bidders are required to indicate the Provinces** they are intending to bid in and the respective participating municipalities for this installation RFB (**Annexure A and Schedule 1**). **However this request does not preclude** the Bidders who have the capacity and ability to participate in all provinces for the participating municipalities.

8.2.7. **Pricing**

8.2.8. The Department understands that Bidders will have different capabilities which will enable them to undertake installations as the sector is based on a broad field and require multidisciplinary teams and as such Bidders are therefore required to provide details of the number of Baseline Systems that they can install per day, week and a month as per the proposed lined up Project Teams, Installation Plan and the rate at which they can do this. Based on the tight timeframe for the Installation Phase which should take at most two quarters (i.e. six months – January to June 2019), the bigger the teams as provided by the Bidder will demonstrate the capacity and the ability to execute the task within

the required specified period and this will serve as an advantage for the Bid evaluation;

- 8.2.9. Pricing should be based on a fixed rate per Installation of a Baseline System or Solar Geyser, with the only exclusion being the additional amount where a collection rate from the Temporary Storage is applicable (as further explained below);
- 8.2.10. The Standard Installation Kits for the contracted Service Provider staff and Trained Installation Assistants for Installation Phase should not be quoted for as this would have been provided for in the Training Phase for trainees from which the same Kits will also be utilised during Installation Phase whilst Service Providers' staff or project team's installation kits are at the Service Provider's cost as all contractors are expected to have the tools of trade hence no costing is expected these tools of trade.
- 8.2.11. Service Providers appointed under the same Municipality with specific DIAs will be allocated the equal quantity of Baseline Systems. As a minimum, 500 Baseline Systems cap per Service Provider will apply based on an equal allocation approach. For instance, four Service Providers could be appointed in a municipality with maximum allocation of 2000 Baseline Systems from which an equal share approach would apply to the top four scored Bidders bearing in mind the minimum of 500 systems threshold. Should there be less than four qualified Bidders in that very municipality as well, an equal share approach will still apply. However, should any of the municipalities have one Service Provider as a result of the indication of preference for participation by Bidders, the Department reserves the right to request other Service Providers in that particular province to also consider participating in those municipalities that they did not indicate as their area of preference in order to spread the work equally and prevent any potential risk that could be presented by over allocation to one Service Provider that could result possible delays in completing the task. Service Provider should demonstrate the required skills and capacity to double or triple the teams for Designated Installation Areas. The Department will

consider the size of the proposed project teams to undertake the task as outlined in the Bid within the required time.

- 8.2.12. The Department reserves the right to appoint more than one Service Provider in one Designated Installation Area and or participating municipality in order to meet the strategic needs of the Installation Phase such as Jobs creation and Skills development in the sector whilst also limiting its exposure to risks associated to a particular Installation Service Provider and or risk of any delay(s) in the completion of Installation Phase that could be attributable to any reasons outside the Department's fault. This approach will enable the Department to obtain an appropriate spread of regional and provincial Installers, to ensure the timing and other needs of a particular Designated Installation Area are met and to encourage a range of potential Installation Contractors to participate in the Installation Programme including small and medium sized enterprises.
- 8.2.13. With municipal allocation of SWH Baseline Systems ranging from 2000 to 10 000, an equal allocation for all Service Providers in the beneficiary municipality will be adopted.
- 8.2.14. The contracted Service Providers will have to take into consideration the results or outcome of the Technical Feasibility Assessments in their final Installation Plans pursuant to the inception meetings with the Department and municipalities in order to prepare for execution of the task and consider aligning their plans to work hand in hand with the Social Facilitators appointed within their specific area of installation, that is, Designated Installation Areas.

### **8.3. Management**

- 8.3.1. The "Employer" for all contracted Service Providers under this RFB is the Department and as such all record(s) or statistics of jobs created during this bid should be captured appropriately in line with the template to be provided by the Department for reporting purposes and submitted in line with the reporting timelines.



- 8.3.2. The Installation of Baseline Systems within a Designated Installation Area in terms of one or more Installation Service Level Agreements will be administered and managed by an Installation Project Manager or a Project Officer as designated by the Department. Most importantly and critical is to indicate that performance monitoring and progress on the project will be done jointly with all key stakeholders such as municipalities, Unemployment Insurance Fund (UIF) & Department of Labour and Energy and Water SETA in line with their reporting process as per their respective organisations. However, all progress reports will be submitted to the Department and therefore shared with them so that at any point in time, all the stakeholders are in the loop and have the same information and understanding of the status of the project;
- 8.3.3. The Department will use the lessons learned during the Pilot Project in Nelson Mandela Bay (NMB) Municipality in its governance structures (i.e. Steering and Management Committees) in the broader scale roll out of the programme to enhance installation performance or improve communication with the stakeholders as well resolving complaints received from the beneficiaries.

#### **8.4. Quality Assurance (QA) and Inspection**

- 8.4.1. Quality Assurance (QA) consists of standards which are intended to ensure that products and services perform as expected, as well as the mechanisms to verify that such requirements are fulfilled. The QA builds the credibility necessary for the creation of health, efficient and rapid growing technology markets and ensures that expectations from investors and end-users for technology performance durability and safety are met. The objective of implementing QA mechanisms is to prevent unsafe, underperforming and failure-prone products.
- 8.4.2. Whilst the procured Baseline Systems were tested, verified and certified for local content in line with the Government Production and Local Content Note (i.e. specified local content threshold of 70% tanks and 70% collectors) by the National Treasury as issued in 2013 and revised in 2014 respectively by the South African Bureau of Standards (SABS) since 2016 to 2017, and therefore, it takes a total institutional framework, all stakeholders and market actors (i.e.

policy makers, manufacturers, practitioners, and end-users) to encompass quality infrastructure.

- 8.4.3. Each Installation Service Provider will be contracted to install a set number of Baseline Systems in terms of the minimum and maximum quantum in line with the Installation Service Level Agreement;
- 8.4.4. Each Installation Service Provider will be required to familiarise themselves with Designate Installation Areas through preliminary inspections based on the results or outcome of Technical Feasibility Assessments and reports from the Social Facilitation Service Providers to re-confirm or quality assure the suitability of the Participating Residential Dwellings for installation of the Baseline systems or Solar Geysers as required.
- 8.4.5. To the extent that a Participating Residential Dwellings is not suitable this needs to be notified to the and by the Installation Project Manager of the Contracted Service Provider and to Project Officer or Manager of the Department without delay for further handling and or to be resolved. The contracted Service Provider will be expected to keep a register of all reported cases or incidents in order to form part of the overall project report(s) to be submitted as per the outlined reporting timelines. The Department is entitled to omit any Participating Residential Dwellings (i.e. beneficiary list) which it considers are not suitable for Installation, either as identified by Technical Feasibility Assessment or by the Installation Service Provider or by the Installation Project Manager, and as such this will reduce the total of the Price in line with price per installation.

#### **8.5. Free Issue of the Baseline Systems, Collection from Temporary Storage to Site or Central Storage Location and Transfer of Risk**

- 8.5.1. The already procured 87 000 Baseline Systems are stored at the Temporary Storage in Phelindaba, North West; Mossel Bay, George and Centurion, Gauteng from which the Service Providers will have to collect the Baseline Systems at its own cost for Installation in Designated Installation Areas of the participating municipalities. This collection rate will be in accordance with the Department's standard AA rates. It should be clearly indicated that, the

Department has requested participating municipalities to provide secure Central Storage Location for the Storage of Baseline Systems for the purpose of Installation. As such contracted Service Provider will be expected to provide a security of the procured systems from collection to installation including whilst on site. .

- 8.5.2. The Installation Service Provider will be responsible for the provision of all other materials required for Installation where the Standard Installation kit is not adequate (hence a provisional fixed price has to be quoted for in the event the Comprehensive Installation Kit was not provided for during Training in the case of Trained Installations Assistants);
- 8.5.3. Prior to each collection from Storage, both Temporary and Central Storage Location, any official of the contracted Installation Service Provider entrusted with the collection or dispatching of the Baseline Systems will be required to inspect and reconcile the record(s) of Baseline Systems and associated components for correctness and notify the Installation Project Manager of the Installation Service Provider and Project Officer or Manager verbally and most importantly in writing of any defects or missing components therein;
- 8.5.4. Should no such issues be notified or reported to the respective delegated persons of both the contracted Installation Service Provider and the Department, when the Installation Service Provider has taken possession during collection, the Installation Service Provider will assume the risk in any damage; defects or loss of the Baseline Systems and/or its associated components, including in respect of their transportation to the Designated Installation Area, and up until installation.

#### **8.5.5. Standards for Installation**

The Installation Service Provider must install in accordance with the Works Information (technical requirements). As part of background information, Bidders at their cost can obtain South African National Standard (SANS) 1307 for Domestic Storage Water Heating Systems (obtainable from SABS) and SANS 10106 for the Installation, Maintenance, Repair and Replacement of the

Domestic Solar Water Heating Systems (also obtainable from SABS). While the procured Baseline Systems complied with all the local content requirements, the Department acknowledges the difference in technology types as per each Supplier hence the requirement for Product Specific training. As part of the product specific training, the Installers will be provided with product installation manuals to make sure that technology specific technical requirements for each Supplier or Manufacturer's product are adhered to.

#### 8.5.5.1. **Personnel “Proposed Project Installation Teams”**

- 8.5.5.1.1. Since proper installation is key to proper functioning systems, it is crucial to develop rigorous training for installers (necessary local), and as such each Installation Service Providers will be required to use adequate and suitable qualified and skilled personnel as installers to be complemented by the compulsory hiring of the trained Installation Assistants or Installers trained under the Training Phase of the Social Component of the National Solar Water Heater Programme via the EWSETA;
- 8.5.5.1.2. In addition, Installation Service Providers are required to ensure their installers are accredited for Warranty purposes, and to this end are required to make available their installers for training by the relevant contracted Supplier within the times specified and to be communicated by the Department as per the Supply Agreement for the Manufacturing, Supply, Delivery and Storage of the Solar Water Heater Baseline Systems entered into between the Department and the contracted Suppliers under a separate procurement process;
- 8.5.5.1.3. The contracted Installation Service Providers may only use accredited installers unless otherwise agreed with the Department subject to the experience and skills acquired over time within the sector that were demonstrated in the proposals in response to this RFB;
- 8.5.5.1.4. The contracted Installation Service Provider(s) will also be required to ensure that the installers performing Installations are qualified PIRB registered plumbers and hold the following qualifications:

8.5.5.1.4.1 PIRB registered plumber with FET Certificate Qualification ID: 58782 Level 4, or equivalent, and National Certificate: Hot Water System Installation Qualification ID: 65858 Level 2 or,

8.5.5.1.4.2 Plumber with FET Certificate Qualification ID: 58782 Level 4, or equivalent and Unit standard SAQA ID 244499: "Install and maintain solar water heating systems".

#### **8.5.5.1.5. Installation Completion Date and Termination Date**

8.5.5.1.5.1. There will be one completion date for each Installation Service Provider (that is, each Installation Service Provider's Works will not be sectionalised);

8.5.5.1.5.2. The Department will have a termination right where the installation is of poor quality due to poor workmanship not remedied after the issues have been brought to the attention of the Service Provider(s) several times without success and the task not completed within a certain period after the contractual completion date.

#### **8.5.5.1.6. Insurance for Baseline Systems or Solar Geysers**

8.5.5.1.6.1. The Insurance of Baseline Systems or Solar Geysers will be the responsibility of the Installation Service Provider, from the point of collection to guard against any damages and theft from point of collection and installation defects that may also be noticed within a year of installation.

#### **8.5.5.1.7. Defects Notification Period(s)**

8.5.5.1.7.1. Installation Service Provider will be required to commit to a defect notification period of 1 year, for the remedy of any defects due to improper Installation, however, appropriate provisions will be included to ensure that this does not void the Supplier's warranty to the extent it covers improper Installation by the accredited installer.

## 9. Project Deliverables / Outputs

- 9.1. **Detailed Installation Plan** (i.e. outlining the roles of the Project Teams from Collection of Solar Geysers from the Temporary Storage to Central Storage Location and Installation including manning of the site office during the entire period of installation) that will serve as Project Plan;
- 9.2. **Develop an Inception Report detailing the methodology providing clear project plan, methodology, and milestones.** The Inception report should be submitted 7 (seven) days after the inception meeting and commencement of installation;
- 9.3. **Weekly and Monthly reports** (this will include both normal progress project reports and defects notification reports) for areas of installations to be submitted to the Project Officer of the Department by the Installation Manager as and when required;
- 9.4. **Develop a Complaints or Queries Standard Operations Procedure (SOP)** to be approved by the Department and to be accompanied by a **Register** to record all the queries and complaints as and when they are lodged or reported as the case may be. It should be clearly indicated that the Department SOP, Complaints and or Queries SOP will have to be shared with the participating municipalities on how all the complaints and or queries will be managed to enhance communication with everyone or stakeholder involved in the installation and other interlinked activities;
- 9.5. **Complaints and or Queries Reports** to be submitted weekly and consolidated into a monthly report to be submitted by the Installation Project Manager to the Project Officer of the Department;
- 9.6. **Solar Water Geysers Insurance Documentation** (including Public Liability or All Risk Insurance) to be submitted to the Project Officer of the Department immediately after the appointment and before the commencement of installation;
- 9.7. **Jobs Report** to be submitted to the Project Officer of the Department immediately after commencement of the installation task and thereafter monthly as per the template that will be provided by the Project Officer of the Department and as and when required;

- 9.8. **Injuries incidents reports (as per the Occupational Health and Safety Report procedure(s) and legislative frameworks)**, should there be any, immediately after the incident and final report after the full investigation;
- 9.9. **Record / Minutes** of all meetings held with other stakeholders during installation phase / period;
- 9.10. **Attend and provide project report** on all the project management progress and provincial steering committee meetings (i.e. all reports to be submitted 7 (seven) days prior to the meeting unless agreed upon with the Department to submit on a different depending on the reasons);
- 9.11. All progress reports should include the **Geographic Information System (GIS)** for all the Installations done daily, weekly and monthly. The Service Provider should outline how the daily GIS information would be fed to the Department. As part of training or skills transfer and job creation including strengthening capacity, Service Providers are encouraged to involve unemployed GIS graduates under the supervision of an experienced GIS Professional or expert.

#### **9.11.1 GIS Minimum Requirements**

The following outlines a non-exhaustive list of GIS minimum requirements for the envisioned Solar Water Heating (SWH) Installations.

- 9.11.1.1 Store, export and import a pre-designed data collection questionnaire;
- 9.11.1.2 Collect, organize and analyse field data as per the questionnaire;
- 9.11.1.3 Generate daily/weekly/monthly/quarterly reports for each data field;
- 9.11.1.4 Capture and send site photos (5-8);
- 9.11.1.5 Barcode Scanner (Optional);
- 9.11.1.6 Client and Technician Signature;
- 9.11.1.7 Automatic population of GPS Coordinates;
- 9.11.1.8 Quantify the number, type and duration of job opportunities created (per project site and/or entire programme);
- 9.11.1.9 Quantify the amount of local spend on the Programme vis-à-vis foreign one
- 9.11.1.10 Be linked to an interactive web map;

- 9.11.1.11 Receive, store and report on real time performance data from monitored systems;
  - 9.11.1.12 Receive, store and report on the programme's socio-economic impact within the sampled households;
  - 9.11.1.13 Receive, store and report on the programme's technical audits;
  - 9.11.1.14 Receive, store and report on any other programme's activities as and when determined by the Department
  - 9.11.1.15 Provide an option for the beneficiary to acknowledge and confirm installation of the system by signing on the mobile data collection device
- 9.11.2 In brief, the system should provide a data capturing, monitoring and reporting solution for the management, verification and reporting of solar water heater installations. The collected data, including jobs cards, must be synchronised to the server in real-time. All collected data and/or information, in the form of other reports, must be fully exportable as and when required.

9.12. Develop a final **Close Out and or Completion Report**.

## **10. Payments**

**10.1. The DoE will not make an upfront payment to a successful Service Provider.**

10.2. Payment will **only be made in accordance with the delivery of the services (deliverables and milestones) as per the Installation Service Level Agreement** and in particular, the payment schedule that would have been agreed upon by both parties upon receipt of an original invoice.

10.3. The **payment schedule will be negotiated with recommended Service Provider(s)** prior to parties concluding the Installation Service Level Agreement (SLA).

10.4. Payment in respect of an Installation is only due upon completion of the installation and successful commissioning. An Installation Completion Certificate will be issued and signed by both the Department's Project Officer and Senior Manager together with the contracted Service Provider's Installation Project Manager certifying that this has occurred. The Installation Completion Certificate(s)



for each installation accompanied by project progress installation report must be attached to an application for payment (i.e. payment request).

## **11. Reporting Requirements and progress meetings**

- 11.1. It is envisaged that the Department of Energy will require **an initial inception meeting with the successful bidder** to discuss the inception report to be submitted shortly thereafter.
- 11.2. Progress meeting feedback shall be held weekly or bi-weekly in the first month and thereafter monthly. A plan for progress meetings shall be included in the inception report. The venue for these meetings will be at a venue to be provided by the participating municipality at their nearest respective offices in that province or town (any of the nearest office(s) next to the installation area. The Service Provider shall be obliged to attend, where applicable, conference calls shall be used to substitute face to face meetings.
- 11.3. The Service Provider through its authorised person and the Installation Project Manager will report directly to the Project Officer and respective Senior Manager of the Department Manager who will be responsible for the day to day running of the project and also giving instructions as and when required to enable the successful installation of the Baseline Systems or Solar Geysers.

## **12. Completion Date**

- 12.1. The duration of the project shall be six (6) months after signing of the contract with the Service Provider(s).

## **13. Compulsory Information Session**

- 13.1. All interested potential Service Providers or Bidders should attend the **compulsory briefing or information session** in order to qualify for submission on this request for proposal (RFP) as per this RFB. A compulsory information session will be held on **30 January 2019 at 10H00** at Department of Energy, 192 Matimba House, Corner Paul Kruger and Visagie Streets, Pretoria

## **14. Evaluation Methodology**

### **14.1. Cost**

14.1.1. Service Provider will be required to provide a quote as per the details provided under pricing, paragraph 8.3 of this RFB including as a minimum covers the functions listed under the scope of work and deliverable/outputs of this RFB. Schedule 2 is provided for pricing as a guidance.

## **15. PRE-QUALIFICATION**

The appointed service provider (s) will be expected to subcontract 30% of the value of the contract to the designated EME's or QSE's which are 51% owned blacks.

## **16. Tender Award**

### **16.1. Broad-Based Black Economic Empowerment (B-BBEE)**

16.1.1. Provisions of the Preferential Procurement Policy Framework Act, 2000 (PPPFA) and the Preferential Procurement Regulations 2017 will apply in terms of awarding points.

16.1.2. Bidders are required to submit original and valid B-BBEE Status Level Verification Certificates or certified copies thereof together with their bids, to substantiate their B-BBEE rating claims.

16.1.3. Bidders who do not submit their B-BBEE status level verification certificates or are non-compliant contributors to B-BBEE will not qualify for preference points for B-BBEE.

16.1.4. A trust, consortium or joint venture must submit a consolidated B-BBEE status level verification certificate for every separate bid.

16.1.5. Accounting Officers must ensure that the B-BBEE Status level Verification Certificates submitted are issued by the following agencies:

<b>B-BBEE Status Level of Contributor</b>	<b>Number of points (80/20 system)</b>
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

## **17. Evaluation Criteria**

### **17.1 Company Experience**

17.1.1. Service Provider should have at least have a minimum of five (5) years' experience in energy sector in particular solar or hot water heater or solar thermal panels installation and also writing of projects reports and project planning documents.

17.1.2. Companies/ consortiums or joint ventures owned by Designated groups (i.e. women, youth, people with disabilities and military veterans) are encouraged to participate.

17.1.3. The above mentioned experience must be supported by proof of three (03) contactable reference letters indicating when and where the experience was gained.

17.1.4. Where the company experience is less than 5 (five) years in the solar or hot water heater installation sector, at least the project teams' individual experience in the sector should be from five years and above. However, the Team leader should have a minimum of 6 years of experience in the energy sector or related sectors.

## **17.2 Team Leader and Team Members' Experience**

17.2.1 Team leader must have a minimum of six (6) years of experience in the energy sector or related sectors and report writing, technical data analysis and monitoring and evaluation of energy projects. A traceable record on the development of such projects is required. Additional experience in solar or hot water installation will be required.

17.2.2 Individual team member(s), if any, must have a minimum of four (4) years' experience in energy projects implementation including electrification in particular solar home systems, data collection, research and analysis. A traceable record of developing such projects is required. In companies that are less than five years' experience, the individual team members should have at least a minimum of five (5) years' experience with traceable record.

17.2.3 Both team leader and team member(s) must be familiar with the Clean Energy sector, that is, renewable energy, energy efficiency programme and renewable energy market in South Africa and or internationally. A reasonable understanding of Government initiatives on renewable energy, energy efficiency and climate change is required.

17.2.4 Brief Curriculum Vitae (CV) of the proposed project team leader and member(s) describing their relevant skills and experience, and roles in the proposed projects must be included in the proposal. **Bidders who fail to attach relevant CV's will forfeit points.** Each CV must not exceed four (4) pages.

17.2.5 Both team leader and team members must have five years' experience in either report writing or project plans or methodology development and a traceable record is essential.

### 17.3 Qualification(s)

- 17.3.1 Team leader must possess a minimum of a National Diploma or Degree in Electrical (i.e. both light and heavy current), Civil Engineering, Environmental Engineering, Technology Management or Engineering, and Total Quality Assurance Engineering. A postgraduate degree will be an added advantage. Any of these fields: energy studies, environmental science, social sciences, economics, and natural science, and development studies should be supported by certificates in PIRB registered plumber with FET Certificate Qualification ID: 58782 Level 4, or equivalent, and National Certificate: Hot Water System Installation Qualification ID: 65858 Level 2 or Plumber with FET Certificate Qualification ID: 58782 Level 4, or equivalent and Unit standard SAQA ID 244499: "Install and maintain solar water heating systems".
- 17.3.2 Team member(s) from the Preferred or Successful Qualified Installation Service Provider in exception of the Installation Assistants or Installers trained under the Training Phase of EWSETA must possess a minimum of post matric technical college qualification or any of the artisan related field in any of these fields: energy studies, energy studies, environmental science, social sciences, economics, natural science, engineering and development studies with FET certificates Hot Water System Installation Qualification ID: 65858 Level 2 or Plumber with FET Certificate Qualification ID: 58782 Level 4, or equivalent and Unit standard SAQA ID 244499: "Install and maintain solar water heating systems". **It should be indicated that the Installation Assistants or Installers will not be further screened as they would have already been screened prior to participation in the training phase. The Bidders are required just to indicate how many will they employ in line with the Spreadsheet for Trainees or Installation Assistants as part of this RFB.**
- 17.3.3 Certified copies of certificates for both team leader and team member(s) must be attached to the proposal as proof, failure to attach these means that the bidders will forfeit points.

#### 17.4 Project Installation Plan

- 17.4.1 Project Installation Plan will be required with timelines on installation per day, week, and month and also linked to the other deliverables as indicated under **paragraph 9 of this RFB** to show how the intermediate and final outputs will be met.
- 17.4.2 The proposed Installation Methodology on how the project will be conducted should be included and this should include how the required deliverables will be executed and delivered including record keeping, complaints or queries handling, registered and reported.
- 17.4.3 Clarify management structure of the project and assign responsibilities to the team in line with the Project Installation Plan and deliverables.

#### 17.5 Preference Points

- 17.5.1 Bids will be evaluated on **80/20** point system as outlined in the PPR of 2017.
- 17.5.2 The proposals will be evaluated in two phases:

**Phase 1:** Bidders will be evaluated based on functionality. The minimum threshold for functionality is **70 out of 100 points**. Bidders who fail to meet minimum threshold will be disqualified and will not be evaluated further for price and B-BEEE points.

#### 17.6 Evaluation Criteria

No	Criteria	Weights
1	<b>Company Experience</b>	<b>10</b>
	i. Potential Bidder or Service Provider as a company should at least have a minimum of five (5) years of experience in energy sector in particular installation of clean energy projects or electrification projects. Experience in the solar or hot water and installation sector solar panels or	05

	solar homes systems installations will be an added advantage.	
	ii. The above mentioned experience must be supported by proof of three (03) contactable references indicating when and where the previous work was executed.	05
<b>2.</b>	<b>Team Leader and Member Experience</b>	<b>20</b>
	i. Team Leader must at least have six (6) years' experience in solar or hot water installation, technical report writing, technical data analysis and monitoring and evaluation of clean energy related projects in particular electrification, energy efficiency and renewable energy.	05
	ii. Individual team member(s), if any, must have a minimum of four (4) years' experience in energy projects implementation including electrification in particular solar home systems, data collection, research and analysis. A traceable record of developing such projects is required.	05
	iii. Both team leader and team member must have a minimum of five (5) years' experience in report writing or technical report writing record is essential.	05
	iv. Brief Curriculum Vitae (CV) of the proposed project team leader and member(s) describing their relevant skills and experience, list of relevant project executed and roles in the proposed projects must be included in the proposal.	05

3	Qualifications	20
	<p>i. Team leader must possess a minimum of a National Diploma or Degree in Electrical (i.e. both light and heavy current), Civil Engineering, Environmental Engineering, Technology Management or Engineering, and Total Quality Assurance Engineering. A postgraduate degree will be an added advantage. Any of these fields instead of the above: energy studies, environmental science, social sciences, economics, and natural science, and development studies should be supported by certificates in PIRB registered plumber with FET Certificate Qualification ID: 58782 Level 4, or equivalent, and National Certificate: Hot Water System Installation Qualification ID: 65858 Level 2 or Plumber with FET Certificate Qualification ID: 58782 Level 4, or equivalent and Unit standard SAQA ID 244499: "Install and maintain solar water heating systems".</p>	05
	<p>ii. Individual team member(s), from the Preferred or Successful Qualified Installation Service Provider in exception of the Installation Assistants or Installers trained under the Training Phase of EWSETA must possess a minimum of post matric technical college qualification or any of the artisan related field in any of these fields: energy studies, energy studies, environmental science, social sciences, economics, natural science, engineering and development studies with FET certificates Hot Water System Installation Qualification ID: 65858 Level 2 or Plumber with FET Certificate Qualification ID: 58782 Level 4, or equivalent and Unit standard SAQA ID 244499. A traceable record of developing such projects is required. One of the Team</p>	05



	Members should have specialised in GIS as a major and also to lead the support team on all GIS related activities.	
	iii. One of the team members must have a GIS qualification to ensure that other members of the support team are well led on all GIS related activities	05
	iv. Relevant certified certificates of all team leaders and members must be attached to the proposal as proof; failure to attach these will result in bidders forfeiting points.	05
<b>4</b>	<b>Project Installation Plan</b>	<b>50</b>
	i. Intermediate and final outputs, identified timeframes and milestones – project scope of work for installation.	15
	ii. A clear methodology and tools to be used in executing the project as outlined under paragraph 9 demonstrating an understanding about the successfully execution of the project mobilized communities.	15
	iii. Overall project management structure related to the project management of activities related to execution of the project. It should be indicated that the Installation Assistants or Installers will not be further screened as they would have already been screened prior to participation in the training phase. The Bidders are required just to indicate how many will they employ in line with the Spreadsheet for Trainees or Installation Assistants as part of this RFB.	20

**100**

**Total**

**NB: IT SHOULD BE NOTED THAT PROPOSALS THAT ARE UNCLEAR AND NOT ADHERING TO THESE INSTRUCTIONS WILL FORFEIT POINTS**

**For purpose of evaluating functionality, the following values will be applicable:**

<b>1=</b>	<b>Poor</b>	Will not be able to fulfil the requirements.
<b>2=</b>	<b>Very poor</b>	Will partially fulfil the requirements.
<b>3=</b>	<b>Good</b>	Will be able to fulfil the
<b>4=</b>	<b>Very Good</b>	Will be able to fulfil better and adequately in terms of the requirements.
<b>5=</b>	<b>Excellent</b>	Will fulfil the requirements exceptionally.

**Phase 2:**

<b>Price</b>	<b>80</b>
<b>B-BBEE compliance</b>	<b>20</b>

**18 Format and Submission of proposal**

18.1.1 All the standard bidding documents (SBD) must be completed in all respects by bidders. Failure to comply will invalidate a bid.

18.1.2 Bidders are requested to submit two (02) copies: 01 original plus copy of the proposal and bid documents.

## **19 Bid Submission Date and or Closing Date**

- 19.1** Proposals must be submitted on or before **13 February 2019 at 11H00** at the Department of Energy, 192 Matimba House, Corner Paul Kruger and Visagie Streets, Pretoria in a bid box marked Department of Energy. **No late bids will be accepted.**

## **20 Enquiries**

- 20.1** All technical enquiries to be directed in writing to the following officials and copied to Email address: SWHInstallation@energy.gov.za:

Mr Pheladi Masipa

Tel: (012) 406 7650

Email: Pheladi.Masipa@energy.gov.za

Or

- 20.2** Mr Siyabonga Zondi

Tel: (012) 406 7904

Email: Siyabonga.Zondi@energy.gov.za

Or

- 20.3** Ms Lebogang Mosenthal

Tel: (012) 406 7655

Email: Lebogang.Mosenthal@energy.gov.za

Or

- 20.4** Mr Takalani Rambau

Tel: (012) 406 7657

Email: Takalani.Rambau@energy.gov.za

20.5 All bid enquiries to be directed to:

Ms Rachel Moerane

Tel: (012) 406 7747 / 7742

Email: Rachel.Moerane@energy.gov.za

Or

20.6 Ms Keitumetse Pitse

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