
Bid: EDT 002-21: Municipal Energy Resilience (MER): Strategic Advisory Services

Voluntary briefing session: 03 September 2021

Question & Answers¹

1) Is it envisaged that the Department will work with one service provider or a set of service providers?

The department is seeking to work with one service provider and not award to multiple service providers. The Terms of Reference, specifies that one service provider is invited to bid and that each service provider can submit a single bid under:

- Section 1: Purpose, invites a single service provider to meet the bid requirement and 1.5 "...seeks to appoint a service provider with extensive energy technical expertise and experience to provide strategic advisory services...", and
- Section 4: Evaluation methodology, sets out the evaluation of a single bid.

If the complete set of scope and services is not provided by a single company, then section 7.1: Proposal, indicates the proposal should state the Company / consortium / joint venture overview / sub-contracting arrangement profile and furthermore section 11: On Joint venture/consortium and section 12: on Sub-contracting requirements, indicate requirements for sub-contract, joint venture or consortium of multiple parties that could present a single bid.

2) Does the Department consider commercial competence for the whole process, is there a reason for the lack of detail, i.e. financial modelling, pipelines, infrastructure to be built? Has the work been done already, or is it implied in e.g. feasibility studies to be undertaken?

In Section 2: Background, the MER initiative approach and high-level plan indicates the major phases and activities in the MER programme of implementation. Note that the MER programme is in the final stages of Phase 1. i.e. the MER programme progress including the detailed work of municipal readiness evaluation, financial and infrastructure in the business cases and the Request for Information (RFI) to inform potential pioneering projects has been completed. The roadmap of pioneering projects include technical, financial and legal aspects in pre-feasibility is currently underway (this is being developed separately by a Project Development Services consultant team). One of the MER SA deliverables is to draft a detailed strategic plan across the 3 phases, working with the Department's MER project team as well as specialist consultants at various stages. In Phase 2 and 3. It is anticipated that these specialist consultants will include transaction advisors to implement the pioneering projects in municipalities. This may include the level of comprehensive feasibility studies (including but not limited to technical and financial feasibility) to be completed.

The main function of this terms of reference is advisory support of a strategic nature, requiring the advice provided to have an awareness and ability to provide inputs and assess outputs from other specialist service providers and transaction advisors. The Strategic Advisory service provider therefore has to include a level of understanding of all of the aspects of the

¹ NB: this document will be updated as regularly as possible to reflect further queries received and answers provided until closure of the bid window 20 September 2021

pioneering projects and to lead to the master plan of new generation capacity projects across the province in Phase 3 which the Strategic Advisory service provider will need to develop and finalise.

3) If a service provider is selected will there be a conflict of interest should they want to bid for future work?

The Strategic Advisory service provider can tender for other work potentially requested by WCG, associated with the MER programme after the expiry of this current contract at the end of Phase 3. Depending on the nature of the strategic advisory work with municipalities, the service provider might bid for tenders potentially requested to be procured directly by municipalities. However, this bid is for a strategic advisory service, the project development and transaction advisory and other tenders for the implementation of projects will be evaluated on a case by case basis by municipalities to ensure fairness, competitiveness and transparency.

4) Does the department require certified copies of qualifications?

No, certified copies are not required but qualifications must be detailed in the appropriate annexure. The department reserves the right to request these should it be necessary.

5) What is the closing date for submitting questions?

Questions can be posed at any time before the closing date of 20 September 2021, however allowing for adequate time for a response to be submitted by the department.

6) Can the Department distribute the word version of the annexures?

Yes, these will be distributed post the briefing session to the attendees of the briefing session and can be made available upon request.

7) It seems that there will be a close working relationship between the service provider and the client which will require ongoing presence.

Yes, it is anticipated that there will be a close working relationship given service requirements as stated in the bid specifications specifically section 3: nature and scope of services to be rendered to understand the level and detail of work and interactions required. Furthermore, section 6: Reporting and monitoring, addresses the detail of project management and based on section 7: Service provider proposal, requesting a detailed and comprehensive proposal. The department and service provider will work very closely together which is why a dedicated team managed by a skilled and experienced lead advisor as per the criteria and functionality outlined in section 4 is required.

Briefing session ends.

Additional query per email after the briefing session:

- 8) The RFP indicates that a max of 25 pages are required for the proposal and wanted to check what is included as the scope is very comprehensive and to manage our response, we will need to be very clear and concise.

7.1 Proposal (included in the page limit)

7.2 Proposed team / individual CVs (is this included or excluded in the page limit ?)

7.3 Annexures (excluded in the page limit)

7. SERVICE PROVIDERS PROPOSAL: The bidder is required to submit a detailed and comprehensive proposal (maximum 25 pages, not including other supporting documentation required) as a bid in response to this term of reference.

Referring to section 7: Service provider proposal, see below table outlining detail requirements regarding page limits:

Ref	Document title	Pages
7.1	Proposal	25 pages (High level Project plan included, however should a Work breakdown structure, a MS Project plan or similar layout, Gantt chart/graphic layout be presented, in support of high level project plan, it can be added as attachments and not included in 25 pages)
7.2	Proposed team/individual's CVs	Max 5 pages each (excluded from page limit 25 pages 7.1 Proposal document, however related to key lead advisor, and key employees that will work on the project and referred to in 7.1 Proposal, and included in Annexure A and B)
7.3	Annexure A and B	Excluded from page limit of 25 pages from Section 7.1 Proposal document

- 9) Please confirm that only one (1) hard copy of the bid needs to be deposited in a sealed envelope in the specified tender box.

It is herewith confirmed that only one (1) original hard copy of the bid is required.

- 10) Please confirm that no electronic copy of the bid needs to be submitted, in the same envelop as the hard copy of the bid document.

An electronic copy is not required to be submitted but would be appreciated.

- 11) In the Western Cape Government (WCG) Request for Bid document EDT 007-20, issued in November 2020, the WCG requested the services of a service provider to provide strategic advisory services for the Municipal Energy Resilience Project implementation in the Western Cape. Please advise whether the current Request for Bid document EDT 002-21 that also request strategic advisory services for the MER project implementation in the Western Cape will replace the service provider that was procured under Bid Document EDT 007-20, or whether the service provider, to be appointed under Bid Document EDT 002-21 will have to report to both the service



provider appointed under Bid Document EDT 007-20 and the WCG, or alternatively whether the service provider to be appointed under Bid Document EDT 002-21 is expected to provide strategic advice to both the WCG and the service provider appointed under Bid Document EDT 007-20.

There is no longer a service provider contracted under EDT 007-21. Bid document EDT 002-21 advances on EDT 007-21 and replaces some of the strategic advisory services that were originally part of the EDT007-21 contract. The strategic advisor to be appointed under ED 002-21 will only report to WCG.

- 12) Paragraph 3 of your Terms of Reference document stipulates that the services will be required for a period of two financial years. Please confirm that the expectation of the WCG is that the services should be rendered over a period of 24 months (and not 16 months or 20 months for example)**

The Terms of Reference in section 3: Nature and scope of services states "...requires highly experienced technical expertise over a period of two financial years (2021/22 and 2022/23) ...", this was intended to note that the contract will span over 2 consecutive financial years, each with a financial year end of 31 March of the year.

section 5 on Duration in the Terms of Reference states:

5.1 "This assignment is over a one-and-a-half-year period..."

5.2 Commencing 5 October 2021 (to be confirmed)"

5.3 "Completion 15 March 2023".

As a result, services under the contract should be rendered within the 18 months (one-and-a-half-year) duration. However, noting the anticipated commencement date and completion date might not be exactly at the start and end of the respective months.

- 13) The footnote at the bottom of Page 8 of your Terms of Reference states that: 'Note that strategic advice elements in the services table are over and above the deliverables required. Service providers should make provision not only to cost and ensure that the adequate time is accounted for in the development of deliverables, review and finalisation of deliverables, but also for the strategic advice.' There is no indication in the scope document on the extent of advice that may be required. This advice could be a 10% time commitment or a 90% time commitment, especially if such advice needs to be rendered to both the WCG and the service provider appointed under Request for Bid document EDT 007-20, issued in November 2020. Is there any specific expectation from the WCG in this regard, i.e. that the advisory team needs to avail themselves for 25, 50, 75 or 90 percent of their time over the stipulated two year period?**

In the Terms of Reference section 5: Duration of contract, it states 5.4 "It is anticipated that a lead advisor strategic consulting and senior energy advisor and key staff (up to 5 other persons), will be allocated on average around 50% for the work in both FY2021/22 and FY2022/23."

The WCG therefore provides an expectation of 50%, on average, of the time of the lead advisor strategic consulting and senior energy advisor and key staff, within an 18 month period dependent on actual contract start date but fixed to completion by mid-March 2023. This time allocation includes all deliverables and strategic advice required under this terms of reference. The allocation "on average" should also indicate that it might be higher or lower than 50% at different phases for different consultants on the team and for different deliverables and advice,

depending on the project plan in the proposal, though averaging out at 50% average allocation.

14) Please provide an indication of the number of pages that the MER business case report comprise, to enable us to make appropriate provision in our bid for this activity.

The business case report (including the policy, legal and regulatory review for all 4 components) comprises of approximately 440 pages (inclusive of legal review of approximately 120 pages).

15) In the scoring methodology section of the EDT 002 TOR's there is a section speaking of the "Underlying programmes and projects" of the MER. I'm unclear as to what this is referring... It could be the business cases, the technologies, the functional areas etc

The "underlying programme and projects" in section 4: Evaluation methodology of the TOR (i.e. in point 5.1 of the Criteria: Functionality table), refers to the MER programme's several underlying projects or elements that include, but are not limited to, the following: the implementation of pioneering energy projects in candidate municipalities in phase 2; coordination with the metropolitan municipality; developing programme and project management for phase 2 and phase 3; investigating procurement and development options for phase 2 and 3 (including a roadmap for such programme/procurement/project management and structures); the development of a Western Cape Integrated Resource plan; and the development of a master plan of energy projects (a programme/portfolio of projects) across the province.

16) There are different interpretations of how Annexure A should be completed, please advise which interpretation WCG has in mind.

The following points serve as a guideline and expectation for completion of Annexure A:

1. Annexure A is intended to assist with evaluation per resource, as indicated in the table in Section 4: Evaluation methodology points 1, 2, 3 and 4
2. The first column is intended to number the key resources, i.e. for each name of the resource (in 2nd column).
3. In order to complete the experience relevant to the assignment, it is expected that the number of years of experience by project/job/assignment is provided for each resource e.g. where a senior energy advisor has 5 years relevant experience in project 1 and 7 years' experience in project 2 that the number of years of experience be denoted under the column energy advisory by Project e.g. Project 1: 5 years and Project 2: 7 years. The project/job/assignment can then be cross referenced to the same project/job/assignment in Annexure B against each resource. (See attached examples of Annexure A and B)
4. The respondent should decide, based on the ToR, how to structure their team and resources i.e. whether a lead advisor and senior energy advisor will be the same person and, in such a case, might require more support of other key staff and a project manager/administrator. Note if the lead advisor and senior energy advisor is the same person, this will impact on the scoring and the supporting key staff. Furthermore, note that the two roles (lead advisor and senior energy advisor) each have significant distinctly different experience, expertise and execution criteria/requirement, as well a consulting hours/time requirement.



17) What is the expectation in terms of reference to Annexure B, as reflected in the heading of the rightmost column of Annexure A?

The project/job/assignment referenced in Annexure B, per resource name, will be used to assist in the evaluation of the duration and depth of experience and expertise, under the relevant years of experience noted in Annexure A. Thus, the same project/job/assignment provided in Annexure B should be clearly indicated in Annexure A. Furthermore, the project/job/assignment should be clearly identifiable in the CVs of each resource – the max 5 page CV referred to in section 7.2: Proposed team/individuals' CVs, specifically "Short synopsis of relevant projects that the individual and/or each team member has worked on including roles and responsibilities and, specifically, large scale and complex energy related strategic programmes (see Section 4: 1, 2, 3)"

18) How many years back do we need to go to reflect relevant experience - 15 years or total career?

Section 7.2 of the Terms of Reference refers to the Proposed team/individuals' CVs, specifically "Number of years' experience and expertise relevant to this assignment - Provide details of the professional experience pertinent to the Scope of Work (see Section 4: 1, 2, 3)". Thus, what is required is for the service provider to denote the experience that is relevant to the assignment and the scope of work – this might require any period of time as long as it is relevant to this TOR and the scope of work.

19) We are not sure how to interpret the last row of Annexure A: Average number of years. Should that represent the average number of years across people/resources or projects?

Do not fill in the last two lines (rows) of the table i.e. total number of years and average number of years, it is for internal use only