



Holdings Pty Ltd

REQUEST FOR TENDER

CONTRACTOR WORK PACKAGES

SHEPI – AIR CONDITIONING & ENERGY EFFICIENCY WORKS

DOCUMENT 01

INVITATION TO TENDER & CONDITIONS OF TENDERING

Issued by ATIZ Holdings Pty Ltd (ATIZ Group) Procurement.

This RFT is for the procurement of contractors to support ATIZ's delivery of the Social Housing Energy Performance Initiative (SHEPI) Air Conditioning and Energy Efficiency Works.

Tender Reference: ATIZ-SHEPI-010

Issue Date: 14/09/2026

Closing Date & Time: 23/09/2026

Document Control

Document	Document 01 – Invitation to Tender & Conditions of Tendering
Issued By	ATIZ Holdings Pty Ltd – Procurement
Procurement	ATIZ Contractor Work Packages – SHEPI Air Conditioning & Energy Efficiency Works
Tender Reference	ATIZ-SHEPI-010
Confidentiality	Commercial in Confidence – ATIZ Procurement

1. Purpose of this RFT

ATIZ Holdings Pty Ltd (ATIZ) has been engaged to deliver air-conditioning and associated energy-efficiency works within occupied social housing properties. ATIZ is now conducting its own contractor procurement process to establish a panel and/or select contractors to perform defined work packages under ATIZ's direction.

This Request for Tender (RFT) is issued by ATIZ Procurement. ATIZ will administer the tender process, assess submissions, conduct any required clarifications or negotiations, appoint successful contractors and manage subsequent work allocation.

The works form part of ATIZ's delivery of the Social Housing Energy Performance Initiative (SHEPI). References to SHEPI in this RFT provide project context and identify relevant project standards, interfaces and delivery requirements applicable to ATIZ's contractors.

2. ATIZ Procurement Objective

ATIZ intends to appoint suitably qualified, licensed, experienced and adequately resourced contractors that can deliver allocated works safely, reliably and to ATIZ's required technical, quality, program, tenant-service and evidence standards.

- establish dependable contractor capacity for planned high-volume delivery;
- select contractors capable of working in occupied residential properties with appropriate tenant care;
- ensure every contractor operates within ATIZ's WHS, quality, environmental and project-control systems;
- maintain ATIZ's ability to control program, geographic allocation, sequencing and daily output; and
- create a contractor network that supports ATIZ's social-procurement commitments.

3. Project Background

The works form part of the Social Housing Energy Performance Initiative (SHEPI) and include the supply and installation of reverse-cycle split-system air conditioning together with associated energy-efficiency measures. ATIZ, as the head contractor, is responsible for delivering the required outcomes to its client. Successful tenderers will contract only with ATIZ.

ATIZ has converted applicable client, statutory and program obligations into ATIZ contractor requirements. Tenderers must therefore comply with the requirements issued by ATIZ whether those requirements originate from ATIZ's own management systems, statutory obligations, manufacturer requirements, project specifications or ATIZ's head-contract commitments.

4. Indicative Contractor Work Packages

ATIZ may tender and award work as a single package or as separate trade, geographic, crew-based or property-based packages. The detailed scope and pricing rules will be issued in the Scope of Works and Pricing Schedule.

- Air-conditioning scoping, sizing, supply and/or installation.
- Electrical works associated with air-conditioning and ceiling-fan installations.
- Existing heating/cooling asset inspection, servicing, decommissioning and approved removal.
- Refrigerant recovery, transport, recycling/disposal and supporting records.

- Ceiling-fan supply and installation.
- External door-seal installation and approved draught-proofing works.
- LED lighting replacement.
- Minor building make-good, patching and painting directly arising from the works.
- Commissioning, testing, labelling, certificates and compliance records.
- Digital evidence capture, property documentation and submission through systems nominated by ATIZ.

5. Tender Particulars

Procuring Entity	ATIZ Holdings Pty Ltd
Tender Issuer	ATIZ Group – Procurement
Tender Reference	ATIZ-SHEPI-010
Tender Title	SHEPI Air Conditioning & Energy Efficiency Works
Tender Contact	Merve YILMAZ – Project Team Lead
Tender Email	m.yilmaz@atiz.com.au / info@atiz.com.au
Issue Date	15/09/2026
RFI Closing Date	21/09/2026
Tender Closing Date & Time	23/09/2026 – 14:00

6. Tender Document Suite

The ATIZ contractor tender package will comprise the following documents. Each document is an ATIZ-issued procurement document.

Document	ATIZ Tender Document
01	Invitation to Tender & Conditions of Tendering
02	Scope of Works & Technical Requirements
03	Contractor / Subcontract Conditions
04	Pricing Schedule / Schedule of Rates
05	Returnable Tender Schedules
06	WHS & Site Safety Requirements
07	Quality, Evidence & Property Close-Out Requirements
08	Environmental, Waste & Refrigerant Management Requirements
09	Program, Tenant Management, Reporting & Performance Requirements

Document	ATIZ Tender Document
10	Tender Forms, Declarations & Submission Checklist

7. Status and Hierarchy of Tender Information

Tenderers must treat only documents, schedules, clarifications and addenda formally issued by ATIZ Procurement as part of this tender.

- ATIZ may provide project specifications, forms, evidence requirements, system instructions or extracts of head-contract obligations as attachments or incorporated requirements.
- Any such requirement becomes an ATIZ requirement for the purposes of this tender and any resulting contractor agreement.
- Tenderers must follow ATIZ's communication and instruction protocols and must not act on project directions from third parties unless confirmed or authorised by ATIZ in writing.
- Where an inconsistency is identified between ATIZ tender documents, the tenderer must raise an RFI before tender close rather than make an assumption.

8. Conditions of Participation – Mandatory Requirements

ATIZ may exclude a tender from further evaluation if the tenderer cannot demonstrate the mandatory requirements applicable to its proposed work package.

Requirement	ATIZ Minimum Expectation
Legal capacity	Validly registered business entity with authority to enter into a contract with ATIZ.
Licensing	All company, trade, electrical, refrigeration/refrigerant handling and other licences required for the tendered work.
Insurance	Ability to maintain the insurance limits and policies specified by ATIZ in the tender package.
WHS	Demonstrated WHS management arrangements suitable for occupied residential and construction/service works.
Competency	Appropriately qualified, licensed, competent and inducted personnel for all licensed or specialist work.
Quality	Ability to operate under ATIZ's quality controls, ITPs, inspections, evidence and defect-management process.
Digital evidence	Ability to capture and submit complete property-specific records, including required geotagged/date-stamped photographs and certificates.
Conduct	Acceptance of ATIZ requirements for ethical conduct, confidentiality, tenant behaviour, conflicts and anti-collusion.
Program capacity	Demonstrated labour, supervision, plant, logistics and administration capacity for the proposed allocation.

9. Tenderer Responsibilities

Each tenderer is responsible for:

- reviewing the entire ATIZ tender package and all issued addenda;
- understanding the scope, interface obligations, evidence requirements and performance standards for the tendered package;
- making its own commercial assessment of labour, supervision, travel, accommodation, logistics, plant, administration and overhead requirements;
- ensuring all pricing is complete for the scope allocated under the ATIZ Pricing Schedule;
- identifying all proposed second-tier subcontractors, suppliers and key personnel where requested;
- verifying that proposed resources hold all required licences and competencies;
- raising any ambiguity, error, inconsistency, omission or unpriced obligation with ATIZ Procurement before tender close;
- submitting a complete, legible and properly authorised tender by the closing time.

10. Tender Enquiries, RFIs and Addenda

All tender enquiries and communications are to be directed to the ATIZ Tender Contact identified in the Tender Particulars. Project-related communications outside the tender process must follow the communication protocols issued by ATIZ.

ATIZ may answer an enquiry directly, issue a clarification to selected tenderers or issue an addendum to all tenderers. Where ATIZ issues an addendum, the addendum forms part of the ATIZ tender package and must be allowed for in the tender.

11. Confidentiality and Use of Information

All information issued by ATIZ for this tender is provided solely for the purpose of preparing a tender and, if appointed, performing the resulting contractor works. Tenderers must protect all commercial, property, tenant, security and project information from unauthorised access, use or disclosure.

A tenderer may disclose tender information only to personnel, advisers, insurers, financiers, suppliers or proposed subcontractors who genuinely need the information for the tender and who are bound to maintain confidentiality.

12. Tender Preparation

- Complete all applicable ATIZ Returnable Tender Schedules.
- Provide evidence of licences, insurances, capability, resources and systems requested by ATIZ.
- Provide the proposed delivery methodology and mobilisation plan for the tendered package.
- Disclose all proposed qualifications, exclusions and departures in the ATIZ Departures Schedule.
- Do not rely on verbal discussions as changing the tender. Only written information issued or confirmed by ATIZ Procurement may do so.

13. Conforming and Alternative Tenders

ATIZ requires a conforming tender unless the invitation expressly states otherwise. A conforming tender is one that accepts the ATIZ scope, technical requirements, commercial framework and contractor obligations without material qualification.

A tenderer may submit an alternative offer only in addition to a conforming tender. Any alternative must clearly identify the proposed change, reason, benefits, technical impact, program impact and price impact. ATIZ is not obliged to evaluate or accept an alternative.

14. Tender Lodgement

Tenders must be submitted to the ATIZ Procurement submission channel identified in the Tender Particulars and must be fully received before the stated closing date and time.

- Files must be complete, legible and capable of being opened and assessed.
- All required schedules, declarations and evidence must be included.
- Tender preparation costs are borne by the tenderer.
- ATIZ may reject a late, incomplete, corrupted or materially non-conforming tender.

15. ATIZ Tender Evaluation

ATIZ will evaluate tenders on the basis of best overall value and delivery confidence. Lowest price will not necessarily receive the highest ranking or be selected.

Evaluation Area	What ATIZ Will Assess
Technical compliance	Conformance with ATIZ scope, specifications, installation requirements and evidence obligations.
Capability & experience	Relevant experience, trade capability and demonstrated understanding of occupied-property energy-efficiency works.
Capacity & resourcing	Crews, supervisors, administration, logistics, geographic coverage and ability to meet ATIZ allocation requirements.
Methodology	Mobilisation, scheduling, installation sequence, tenant interfaces, quality controls and issue management.
WHS & risk	Safety systems, high-risk controls, incident history where requested and practical risk management.
Quality & evidence	Inspection, testing, defect prevention, documentation, photographic evidence and property close-out systems.
Commercial	Rates, value for money, pricing completeness, assumptions and commercial risk.
Environmental	Waste, refrigerant, recycling, pollution prevention and environmental controls.
Past performance & references	Reliability, quality, program, conduct, rectification responsiveness and client/reference feedback.

16. Clarification, Interviews and Due Diligence

ATIZ may, at any stage, seek clarification of a tender, request additional evidence, conduct an interview, verify licences and insurance, contact referees, undertake financial or commercial due diligence, request a revised offer or conduct negotiations.

A clarification request does not oblige ATIZ to accept a tender and does not give a tenderer any entitlement to an award or work allocation.

17. ATIZ Procurement Rights

To the extent permitted by law, ATIZ reserves the right to:

- amend, suspend, cancel or reissue this tender process;
- extend or shorten tender timeframes by written notice;
- seek further offers or negotiate with one or more tenderers;
- accept all, part or none of a tender;
- appoint one contractor, multiple contractors or establish a panel;
- split the works by trade, location, crew, package, property type or program stage;
- vary the anticipated volume allocated to any contractor;
- not award any work under this tender;

- consider past performance and current performance on other ATIZ work;
- exclude a tenderer that provides false, misleading, incomplete or unverifiable information; and
- select the tender or combination of tenders that ATIZ considers provides the best overall outcome for its business and project obligations.

18. No Guaranteed Volume or Exclusivity

Unless expressly stated in a signed contract issued by ATIZ, this tender does not guarantee any minimum quantity of properties, work orders, revenue, duration or geographic allocation. ATIZ may appoint multiple contractors and may allocate, reallocate, suspend or reduce work based on project demand, program requirements, performance, access, client instructions, compliance, capacity and commercial considerations.

19. Contractor Performance Standard

A successful tenderer will be required to deliver to ATIZ's project standard. That standard includes all requirements notified by ATIZ for safety, technical compliance, tenant management, quality, documentation, evidence, program, reporting, environmental management, warranty and rectification.

20. Project-Specific ATIZ Minimum Requirements

Detailed requirements will be contained in subsequent ATIZ tender documents. As a minimum, tenderers should allow for the following project environment:

- Works in occupied residential properties requiring professional conduct and careful tenant interaction.
- Property-specific pre-start risk assessment and SWMS compliance before relevant works commence.
- Licensed tradespersons for all licensed work, including electrical and refrigeration activities.
- Electrical isolation, testing, certification and compliance records applicable to the allocated works.
- Air-conditioning installation, commissioning and controls in accordance with ATIZ-issued specifications.
- Evidence capture before, during and after installation, including specified date-stamped/geotagged photographs.
- Property-specific QA, test results, certificates, serial/model data and close-out records.
- Tenant demonstration and sign-off where required by ATIZ.
- Clean site handback, removal of packaging and waste, and appropriate recycling/disposal.
- Approved refrigerant handling and disposal records where equipment is decommissioned.
- Prompt defect rectification and cooperation with ATIZ inspections, audits and surveillance.
- Use of ATIZ-nominated digital systems, forms and reporting processes.

21. Work Allocation and Performance Management

ATIZ will retain full control of work allocation. Appointment under this procurement does not create an entitlement to a particular volume.

ATIZ may consider the following when making or continuing allocations: safety performance, installation quality, first-pass evidence acceptance, tenant feedback, defect levels, daily output, attendance reliability, reporting timeliness, responsiveness, geographical capacity, commercial performance and compliance with ATIZ instructions.

22. Subcontracting and Personnel

Tenderers must identify any material second-tier subcontracting proposed for the tendered package. A successful contractor may not further subcontract material parts of the works without ATIZ's prior written approval.

Approval of a lower-tier subcontractor does not relieve the successful contractor of responsibility for the acts, omissions, safety, quality, conduct or compliance of its personnel and subcontractors.

23. Ethical Conduct, Conflicts and Collusion

Tenderers must act ethically, honestly and with integrity throughout the ATIZ procurement process. Any actual, potential or perceived conflict of interest must be disclosed to ATIZ Procurement as soon as it becomes known.

Tenderers must not engage in collusive bidding, bid-rigging, improper inducements, secret commissions, false representations or any arrangement intended to distort competition or improperly influence ATIZ's procurement decision.

24. Accuracy of Tender Information

All information supplied to ATIZ must be true, accurate, current and not misleading. ATIZ may verify any statement, licence, certificate, reference, personnel claim, capacity statement or other evidence submitted.

25. Tender Validity and No Contract Until Award

A tender remains open for acceptance for the Tender Validity period stated in the Tender Particulars unless ATIZ agrees otherwise in writing.

No contract is formed merely because ATIZ issues this RFT, receives a tender, conducts clarification, identifies a preferred tenderer or indicates an intention to proceed. A binding contract arises only when a formal agreement, purchase order or other written award instrument authorised by ATIZ is executed or issued in the form required by ATIZ.

26. Acceptance and Award

ATIZ may appoint one or more successful tenderers. An award may be for the whole tendered package or only part of it. ATIZ may also establish a preferred contractor panel from which work is allocated progressively.

Before award, ATIZ may require the preferred tenderer to provide updated licences, insurance certificates, key personnel details, onboarding information, signed policies, WHS/quality documents, banking information, training evidence and any other precondition stated by ATIZ.

27. Returnable Tender Information – Overview

The detailed returnable schedules will be issued separately. Tenderers should expect ATIZ to request, at minimum:

- Tenderer legal entity, ABN, registered address and authorised contact.
- Trade/company licences and individual trade licences relevant to the package.
- Refrigeration/refrigerant handling licences where applicable.
- Current insurance certificates and requested limits.
- Relevant project experience and client references.
- Proposed project team, supervisors, installers and geographic coverage.
- Proposed daily/weekly capacity and mobilisation timeframe.
- Methodology for occupied-property delivery and tenant interfaces.
- WHS systems, SWMS capability and incident/declaration information requested by ATIZ.
- Quality management, ITP, inspection, testing and defect-management approach.
- Digital evidence and administration capability.
- Environmental, waste and refrigerant-management approach.
- Pricing Schedule.
- Departures / qualifications.
- Conflict-of-interest and probity declarations.
- Any proposed second-tier subcontractors or critical suppliers.

28. Tenderer Acknowledgement

By submitting a tender, the tenderer acknowledges that it is participating in an ATIZ procurement process, that ATIZ alone will determine the outcome of this tender, and that no representation is made that appointment will result in any guaranteed quantity of work.