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		<b>Effective Date</b>	15 February 2023		
		<b>Review Date</b>	February 2028		

**ESKOM HOLDINGS SOC LTD**

**INVITATION TO TENDER/REQUEST FOR PROPOSAL (RFP)**


**FOR**

**THE PROVISION OF ENGINEERING AND PROJECT MANAGEMENT SERVICES TO  
ESKOM HOLDINGS SOC LIMITED FOR A PERIOD OF (FIVE) 5 YEARS.**

<b>Tender number/ RFP number]</b>	<b>MWP1860CX</b>
<b>Issue date</b>	<b>24 February 2023</b>
<b>Closing date and time</b>	<b>05 April 2023 at 10h00 SAST</b>
<b>Tender validity period</b>	<b>52 weeks from the closing date and time</b>
<b>Clarification meeting</b>	<b>Non-compulsory clarification meeting will take place on MS Teams. Date: 10 March 2023</b>
<b>Tenders are to be delivered to the following address on the stipulated closing date and time:</b>	<b>Eskom Megawatt Park Tender Office Northside (Retail Centre) Maxwell Drive Sunninghill</b>

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## Invitation to Tender/Request for Proposal

Eskom Holdings SOC Ltd (hereinafter “Eskom”) invites you to submit a *tender/proposal* for the provision of Engineering and Project Management services to Eskom Holdings SOC Limited for a period of 5 years.

The enquiry documents are supplied to you on the following basis:

- Free of charge

Eskom has delegated the responsibility for this tender to the Eskom *Representative* whose name and contact details are set out in the Tender Data. A submission of a tender/proposal by you in response to this *Invitation/RFP* will be deemed as your acceptance of the Eskom Standard Conditions of Tender (to be accessed via [www.eskom.co.za](http://www.eskom.co.za)).

Queries relating to these Invitation /RFP documents may be addressed to the Eskom *Representative*.

Yours faithfully



Leonard Moya

Procurement Manager\_Supply Chain and Sourcing Management

Date: 24 February 2023

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1.1 The following documents listed hereunder are attached to this enquiry

Number	Description	Annexure/to be downloaded and attached	Attached (Y/N/ N/A)
1.1.1	*Acknowledgement form	Annexure A	Y
1.1.2	*Tenderer's particulars	Annexure B	Y
1.1.3	*Integrity Declaration Form (refer to <a href="http://www.eskom.co.za">www.eskom.co.za</a> for the Supplier Integrity Pact that suppliers are required to download and read)	Annexure C	Y
1.1.4	*CPA Requirements for Local Goods/Services	Annexure D	Y
1.1.5	*CPA(IG) for Foreign Goods/Services (if applicable)	Annexure E	Y
1.1.6	SBD 6.2- Declaration Certificate for Local Production and Local Content (only applicable if designated materials are included).  Annexure C-Local Content Declaration-Summary Schedule  Annexure D-Imported Content Declaration – Supporting Schedule to Annexure C  Annexure E-Local Content Declaration-Supporting Schedule to Annexure C	Annexure F1  Annexure F2  Annexure F3  Annexure F4	Y
1.1.7	*SBD 1 -Invitation to Bid must be filled out by all tenderers and submitted with the tender at tender submission deadline	Annexure G	Y
1.1.8	*SBD 6.1- Preference Points Claim Form in terms of PPPFA 2022 regulations	Annexure H	Y
1.1.9	*SBD 4 – Bidders Disclosure	Annexure I	Y
1.1.10	Tax Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE <b>[only to be attached for services type of contracts]</b> .		Y
1.1.11	Reverse e-auction training acknowledgement form (if applicable)	<b>Not Applicable</b>	
1.1.12	Reverse e-auction process (if applicable)	<b>Not Applicable</b>	

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1.1.13	Contract Skills Development Goals (CSDG) [if applicable]	<i>To be determined at Task Order Level (if required)</i>			
1.1.14	Contract Participation Goals (CPG) [if applicable ]	<i>To be determined at Task Order Level (if required)</i>			
	<b>Tender Returnables:</b> Tenders must indicate which Panel, category and or grouping they have tendered for; using Table 6 (Annexure K) Categorization and grouping of services). They must as well mark their choices accordingly on their submissions' files (both hard and soft copies <b>NB: Failure to indicate accordingly will lead to disqualification.</b>	Table 6 (Annexure K): Categorization and grouping of services) attached	Y		
	<b>Technical Evaluation Criteria:</b> NB: Technical Evaluation to be clearly understood by the tenderers. In case the Technical Evaluation Criteria requires to be completed, failure to do so and in full will lead to disqualification (that is, some evaluations are dependent on the tenderer/s completing some information on some technical evaluation criteria templates/ spreadsheets).	Engineering Evaluation Criteria and Project Management Evaluation Criteria attached.	Y		

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- 1.2 The Tender Data makes several references to the **Eskom Standard Conditions of Tender** and in those instances, the clause numbers are referenced hereunder. If the **Eskom Standard Conditions of Tender** is not attached to the **Invitation to Tender/Request for Proposal**; then the tenderers are required to download this from [www.eskom.co.za](http://www.eskom.co.za). The “**Tender Data**” as detailed herein shall take precedence over the **Standard Conditions of Tender** in the event of any ambiguity or inconsistency between the two documents.

Clause Number from Standard Conditions of Tender	Tender Data
1.1 Parties	<p>The Employer is <b>Eskom Holdings SOC Ltd</b></p> <p>The Eskom Representative is:</p> <p>Name: <b>Sebotse Lesejane</b>  Tel: <b>011 800 3736</b>  E-mail: <b>lesejass@eskom.co.za</b></p>
1.3 Enquiry documents	<p>The Invitation to tender /RFP number is: <b>MWP1860CX</b></p> <p>See the content list above for the enquiry documents.</p>
1.4 Type of Invitation to Tender/RFP	<p>This invitation to tender/RFP is:</p> <ol style="list-style-type: none"> <li>1. An open Invitation to tender</li> </ol> <p><b>The enquiry document is comprised of the following documents:</b></p> <ul style="list-style-type: none"> <li>• <b>Invitation to tender</b></li> <li>• <b>Scope of Service / Work</b></li> <li>• <b>Technical Evaluation Criteria</b> <ul style="list-style-type: none"> <li>○ <b>Project Management Technical Evaluation Criteria</b></li> <li>○ <b>Engineering Technical Evaluation Criteria</b></li> </ul> </li> <li>• <b>Table 6 (Annexure K): Categorization and grouping of services</b></li> <li>• <b>OHS Requirements</b></li> <li>• <b>Environmental Requirements</b></li> <li>• <b>Quality Requirements</b></li> <li>• <b>SD&amp;L Requirements</b></li> </ul>
1.6 Eskom's rights to accept or reject any tender	<p>The tender shall be for the whole of the contract.</p>
2.1 Eligible tenders	<p>Submit a tender only if the tenderer (whether a single company or a structure similar to a Joint Venture) complies with the <i>eligibility criteria</i> stated in the Tender Data and the tenderer, or any of his principals, is not under any restriction to do business with Eskom/State Owned Companies.</p> <p>Tenderers are deemed <b>ineligible</b> to submit a <b>tender/proposal</b> if</p>

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	<ol style="list-style-type: none"> <li>1. Tenderers have the nationality of a country on any international sanctions list. A tenderer shall be deemed to have the nationality of a country if the tenderer is a national or is constituted, incorporated, or registered and operates in conformity with the provisions of the laws of that country. This criterion shall also apply to the determination of the nationality of proposed subcontractors or suppliers for any part of the Contract including related services.</li> <li>2. Tenderers submit more than one [tender/proposal] either individually or as a partner in a joint venture (JV) or consortium</li> <li>3. [Tenders/proposals] submitted by a JV or consortium where the JV/consortium agreement does not explicitly state that the parties of the JV or consortium shall be jointly and severally liable for the execution of the Contract in accordance with the Contract terms.</li> <li>4. A Tenderer must not have a conflict of interest. All Tenderers found to have a conflict of interest shall be disqualified. A Tenderer may be considered to have a conflict of interest with one or more parties in this [tendering/RFP] process, if : <ol style="list-style-type: none"> <li>1. (a)they have a controlling partner/majority shareholder in common; or</li> <li>2. (b)they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another Tenderer, or influence the decisions of the Employer regarding this bidding process;</li> </ol> </li> <li>5. Tenders signed by non- authorized persons</li> <li>6. Where the tenderers are not registered on National Treasury's Central Supplier Database (except Foreign Suppliers)</li> <li>7. Any tenderer that is restricted by National Treasury</li> <li>8. Any tenderer on the Tender Defaulters list.</li> <li>9. A tenderer that sub-contracts 100% Scope of Work.</li> </ol> <p><b>Ineligible tenderers will be disqualified.</b></p>
2.2 -2.5 Tender Closing	<p>The deadline for <b>MWP1860CX</b> submission is:</p> <p><b>Date: 05 April 2023</b>  <b>Time: 10h00 SAST</b></p> <p><b>Late Tenders will not be accepted</b></p> <p>Tenders are to be submitted to the Eskom <i>tender box</i> at the following physical address:  <b>Eskom Megawatt Park Tender Office</b>  <b>Northside (Retail Centre)</b>  <b>Maxwell Drive</b>  <b>Sunninghill</b>  <b>Johannesburg</b></p>

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2.9 Copy of original tender	<p>The tenderer must submit the tender as a complete original tender, plus one (1) <b>hard copy</b> of the original tender at tender submission deadline.</p> <p><b>Eskom also requires Tenderers to submit ONE (1) additional complete SOFT COPY (memory stick or USB) of the original tender in electronic format. The memory stick or USB should include ALL tender returnables on pages 16-23 of this Invitation to Tender document.</b></p> <p><b>Evaluations are based on the copy provided. Therefore, it is the tenderer's responsibility to ensure that the copy is 100% identical to the original and Eskom will not accept any liability if it bases its evaluation on an incomplete copy provided by the tenderer.</b></p> <p>NB: Where a Tenderer does not submit 1 hard copy of the original tender at tender submission deadline, the tenderer will be disqualified.</p>
2.13 Tender Validity Period	The tender validity period is <b>fifty-two (52)</b> weeks.
2.16 Site/clarification meetings	<p>A <b><i>non-compulsory clarification meeting</i></b> with representatives of the <i>Employer</i> will take place as follows:  Date: <b>10 March 2023</b>  Time: <b>10h00 SAST</b>  Venue: <b>MS TEAMS</b></p> <p><i>Tenderers</i> must confirm their intention to attend with the Eskom Representative by sending an e-mail (stating the name, position and contact details of each proposed attendee) to <a href="mailto:lesejass@eskom.co.za">lesejass@eskom.co.za</a>; before or on the <b>7<sup>th</sup> March 2023</b> at 16h00 SAST.</p> <p><b>Please note that if the tender stipulates that a site/clarification meeting is mandatory/compulsory; then suppliers must attend such meeting. Those suppliers who do not attend such mandatory/compulsory meeting will be disqualified and will not be evaluated.</b></p>
2.17 Clarification on enquiry documents	The tenderer will notify the <i>Employer</i> of any clarifications required before the closing time for clarification queries, which is <b>5</b> working days before the deadline for tender submission.
2.23 Alternative tenders	Alternative tenders are <b><i>not allowed</i></b> .
2.31 Provision of security for performance	Not Applicable at this stage

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3.4 Opening of tenders	<p>Tenders will be opened at the same date and time as the tender deadline;</p> <p>Tenders will be opened on: Place: Eskom Megawatt Park Tender Office Northside (Retail Centre) Maxwell Drive Sunninghill Johannesburg</p> <p>Date: <b>05 April 2023</b></p> <p>Time: <b>10h00 SAST</b></p>
3.5 Prices to be read out	Not Applicable
3.9 Basic Compliance	<p>Basic compliance for this invitation to tender/ RFP are</p> <ol style="list-style-type: none"> <li>1. Meet the eligibility criteria for a tenderer</li> <li>2. Submit TWO (2) hard copies; ONE (1) original and ONE (1) complete and exact copy of the original tender to Eskom. Additional complete SOFT COPY (memory stick or USB) of the original tender in an electronic format is also to be submitted.</li> <li>3. Submit a complete original tender <b>'SEPARATED INTO THE FOLLOWING FOLDERS:</b> Commercial, OHS, Environmental, Quality, Financial Statements and Technical Information files/folders.</li> <li>4. Submission of the mandatory commercial tender returnables as at stipulated deadlines. Central Supplier Database (CSD) number (MAA.....)</li> </ol>
3.10 Mandatory tender returnables	A tenderer that does not submit mandatory documents/information required in mandatory documents by the required deadlines as stipulated in the Tender Returnable section of the respective Invitation to Tender; will be deemed non-responsive.

### 3.13 Functionality requirements


Functionality requirements **are applicable**.

A weighted scorecard approach is used to evaluate the technical compliance of the tenderers against the specifications. Functionality will be evaluated on a total weight of 100%. It comprises of technical evaluation that will be broken down into Engineering Function and Project Management Function.

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**The Technical Evaluation Thresholds for different disciplines are as below:**

Engineering Function (Technical Threshold = 80% for all disciplines)  
 Project Management (Technical Threshold = 66.67%)  
 Integrated Project Controls (Technical Threshold = 70%)  
 Contract Management (Technical Threshold = 70%)  
 Construction Management (Technical Threshold = 70%)  
 Commissioning Management (Technical Threshold = 70%)  
 Project Stability\_Internal (Technical Threshold = 70%)  
 Project Stability\_External (Technical Threshold = 70%)

The following is an overview of the high-level Project Management functionality criteria:

**High-level Project Management Functionality Criteria**

Discipline	Functionality Criteria	Weighting (%)
<b>Project Management</b>	Experience with respect to Project Management throughout the Project Lifecycle	25%
	Perform Project Front-end Planning	20%
	Execute Project	35%
	Manage and Control Project	20%
<b>Integrated Project Controls</b>	Experience with respect to the application of Integrated Project Controls based on number of projects since 2010, that the tenderer provided project controls services for.	30%
	Experience with respect to the application of Integrated Project Controls based on the value (in Rands) of Task orders (purchase orders) or other agreements indicating the total value of the project controls services provided since 2010	
	Set up Integrated Project Controls	20%
	Provide Cost Estimate	15%
	Monitor and Control Project Controls	25%
	Close out Project Controls	10%
<b>Contract Management</b>	<b>NEC</b>	
	Engineering & Construction Contract	30%
	Engineering & Construction Short Contract	10%
	Professional Services Contract	10%

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		Professional Services Short Contract	2%
		Term Service Contract	10%
		Term Service Short Contract	2%
		Supply Contract	5%
		Supply Short Contract	1%
		<b>FIDIC</b>	
		Construction, Plant & Design Build, EPC/Turnkey Projects, Design Build & Operate Projects	15%
		Other FIDIC contract e.g. Short Form of Contract, Model Services Agreement	5%
		<b>Other conditions of contract (specify no more than 2 other conditions of contract which are recognised by National Treasury or Construction Industry Development Board)</b>	
		General Conditions of Contract	3%
		JBCC	3%
		<b>Other contract management related experience</b>	4%
<b>Construction Management</b>	Experience with respect to Construction Management	50%	
	Construction	50%	
<b>Commissioning Management</b>	Experience with respect to Commissioning Management	50%	
	Commissioning	50%	
<b>Project Stability (External)</b>	Experience of the competent person that will be responsible for assisting the Service Provider's Representative with external stakeholder management	25%	
	Experience/competency to facilitate a stakeholder management system that drives strategic partnership with different stakeholders	15%	
	Experience/competency in providing a project liaison service	15%	
	Project's stakeholder stability protocols and institutional arrangements	15%	
	Management of stakeholder issues impacting reputational risks on projects	10%	

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	Social upliftment programmes	5%
	Showcasing contribution to social transformation	5%
	Project stakeholder communication	5%
	Project closeout	5%
<b>Project Stability (Internal)</b>	Experience of the competent person that will be responsible for assisting the Contractor's Representative with internal stakeholder management	25%
	Identification and managing of risks to site labour stability during the pre-construction and construction phases of the project	25%
	Oversee and Enforce Compliance - Enforce and monitor Contractor's compliance with legislation, industry agreements and regulations (MEIBC, BCCEI and SMEIP), collective agreements, Employer's Personnel and IR Requirements, site instructions, recruitment, mobilisation and demobilisation procedures, deadlines and requirements.	20%
	Oversee effective engagement between contractors and employees, and between Eskom and Contractors	10%
	Oversee and, if required, manage industrial action or protest action on site .	15%
	Assist the Employers Representative with contractual correspondence, assessing and determining labour related contractual claims	5%


The following is an overview of the high-level Engineering functionality criteria

#### High-level Engineering Functionality Criteria

Discipline	Mandatory Evaluation Criteria (Gate Keepers)	Tender Deliverable
<b>Group 1-8 Engineering</b>	The tenderer shall have the required experience in successfully completing engineering work of a similar nature in a multidisciplinary infrastructure design and construction projects relating to utilities and energy, and maintenance and operating of either coal, gas, or hydro power plants or similar industries.	<ul style="list-style-type: none"> <li>Company profile detailing experience as a primary service provider</li> <li>References of companies where work similar to the development and</li> <li>implementation of the scope has been completed by tenderer and the contact information of an individual at the referenced company.</li> <li>A description of the scope of a similar nature being compiled by the tenderer.</li> <li>Confirmation that the tenderer was responsible for the scope previously compiled.</li> </ul>

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		<ul style="list-style-type: none"> <li>Number of projects undertaken since 2016</li> </ul>	
	<b>The tenders must be registered with Consulting Engineers South Africa (CESA) or equivalent internationally recognised accreditation.</b> The tenderer must also ensure that engineering work as defined and identified by ECSA for all engineering categories is undertaken by professionally registered Engineers and /Technologists.	<ul style="list-style-type: none"> <li>Proof registration as a professional engineering services provider</li> <li>Evidence that resources (Engineers, Technicians etc.) have relevant technical knowledge and experience for each applicable discipline.</li> </ul>	
	<b>Qualitative Evaluation Criteria</b>	<b>Weighting (%)</b>	
	Team experience and suitability	70%	
	Scope of work as per the works information of the contract	30%	
<b>Discipline</b>	<b>Mandatory Evaluation Criteria (Gate Keepers)</b>	<b>Tender Deliverable</b>	
<b>Group 9 Engineering</b>	The tenderer shall have the required experience in successfully completing engineering work of a similar nature in a multidisciplinary infrastructure design and construction projects relating to utilities and energy, and maintenance and operating of renewable power plants.	<ul style="list-style-type: none"> <li>Company profile detailing experience as a primary service provider</li> <li>References of companies where work similar to the development and implementation of the scope has been completed by tenderer and the contact information of an individual at the referenced company.</li> <li>A description of the scope of a similar nature being compiled by the tenderer.</li> <li>Confirmation that the tenderer was responsible for the scope previously compiled.</li> <li>Number of projects undertaken since 2016</li> </ul>	
	<b>The tenders must be registered with Consulting Engineers South Africa (CESA) or equivalent internationally recognised accreditation.</b> The tenderer must also ensure that engineering work as defined and identified by ECSA for all engineering categories is undertaken by professionally registered Engineers and /Technologists.	<ul style="list-style-type: none"> <li>Proof registration as a professional engineering services provider</li> <li>Evidence that resources (Engineers, Technicians etc.) have relevant technical knowledge and experience for each applicable discipline.</li> </ul>	
	<b>Qualitative Evaluation Criteria</b>	<b>Weighting (%)</b>	
	Team experience and suitability	70%	

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	Scope of work as per the works information of the contract (note the scope of work is included under Group 5 – Mechanical Engineering)	30%	
Discipline	Mandatory Evaluation Criteria (Gate Keepers)	Tender Deliverable	
<b>Group 10-11 Engineering</b>	The tenderer shall have the required experience in successfully completing Digital Transformation in infrastructure, data and system development, and Implementation and support of interface between the Operational Technology (OT) and Information Technology (IT) environments, and Data migration from legacy systems. For draughting, the tenderer shall have the required experience of providing similar services in designing of power plants or similar industries.	<ul style="list-style-type: none"> <li>Company profile detailing experience as a primary service provider</li> <li>References of companies where work similar to the development and implementation of the scope has been completed by tenderer and the contact information of an individual at the referenced company.</li> <li>A description of the scope of a similar nature being compiled by the tenderer.</li> <li>Confirmation that the tenderer was responsible for the scope previously compiled.</li> <li>Number of projects undertaken since 2016.</li> </ul>	
	<b>IT Service Providers must be registered with IITPSA) or equivalent internationally recognised accreditation. For Draughting services, no professional registration required.</b>	<ul style="list-style-type: none"> <li>Proof of registration as a professional IT services provider</li> <li>Evidence that resources (Draughtsman, Data analysts, Developers etc) have relevant technical knowledge and experience for each applicable discipline.</li> </ul>	
	Qualitative Evaluation Criteria	Weighting (%)	
	Team experience and suitability	70%	
	Scope of work as per the works information of the contract	30%	
Discipline	Mandatory Evaluation Criteria (Gate Keepers)	Tender Deliverable	
<b>Group 12 Nuclear Siting</b>	The tenderer shall have experience and its all key personnel assigned to the services in terms of the contract meet the requirements and experience generally required for similar work in the nuclear industry.	<ul style="list-style-type: none"> <li>References of companies where similar work has been completed successfully, including evidence which in the form of: <ul style="list-style-type: none"> <li>Publication in Peer Review Journals on Seismic Hazard Analysis and Engineering Seismology</li> <li>Through contract reports with seismic inputs to nuclear installation design and/or licensing</li> <li>Demonstrate in-depth knowledge of the regulatory requirements and best practice in nuclear</li> </ul> </li> </ul>	

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		siting and the compilation and content of site safety reports; and ○ Demonstrate a substantial record of scientific or engineering research and publications. ○ A copy of the summary report of an authorised scope of a similar nature being compiled by the tenderer. ○ Confirmation that the tenderer was responsible for the reports/publications/programmes previously compiled.	
	The tenderer shall plan to produce the deliverables as described in the works information of the contract within the required timelines.	<ul style="list-style-type: none"> <li>Proposed resource plan showing the human resources available to the tenderer in the completion of the scope.</li> </ul>	
	<b>Qualitative Evaluation Criteria</b>	<b>Weighting (%)</b>	
	Company Profile (Experience in conducting engineering works)	25%	
	Team experience and suitability	35%	
	Scope of works as per the works information of the contract	40%	
<b>Discipline</b>	<b>Mandatory Evaluation Criteria (Gate Keepers)</b>	<b>Tender Deliverable</b>	
<b>Group 13-DPSA</b>	The tenderer shall have experience and its all key personnel assigned to the services in terms of the contract meet the requirements and experience generally required for similar work in the nuclear industry.	<ul style="list-style-type: none"> <li>References of companies where similar work has been completed successfully, including evidence:</li> <li>Performance of PSA model development and updates on the following:               <ul style="list-style-type: none"> <li>Risk Spectrum PSA model updates.</li> <li>Development of external events PSA.</li> <li>Development of a Seismic PSA.</li> <li>Performance of Fire PSA to internationally acceptable standard and integration into the existing main models.</li> <li>Performance of Internal Flood PSA.</li> <li>MAAP analysis</li> </ul> </li> </ul>	

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		<ul style="list-style-type: none"> <li>○ Demonstrate a substantial record of scientific or engineering research and publications.</li> <li>○ A copy of the summary report of an authorised scope of a similar nature being compiled by the tenderer.</li> <li>○ Confirmation that the tenderer was responsible for the reports/publications/ programmes previously compiled.</li> </ul>	
	The tenderer shall plan to produce the deliverables as described in the works information of the contract within the required timelines.	<ul style="list-style-type: none"> <li>• Proposed resource plan showing the human resources available to the tenderer in the completion of the scope.</li> </ul>	
	<b>Qualitative Evaluation Criteria</b>	<b>Weighting (%)</b>	
	Company Profile (Experience in conducting engineering works)	25%	
	Team experience and suitability	35%	
	Scope of works as per the works information of the contract	40%	
<b>Discipline</b>	<b>Mandatory Evaluation Criteria (Gate Keepers)</b>	<b>Tender Deliverable</b>	
<b>Group 14 – Fuel Engineering &amp; Waste</b>	The tenderer shall have experience and its all key personnel assigned to the services in terms of the contract meet the requirements and experience generally required for similar work in the nuclear industry.	<ul style="list-style-type: none"> <li>• References of companies where similar work has been completed successfully, including evidence in the form of reports that demonstrates the following: <ul style="list-style-type: none"> <li>○ In-depth knowledge of the regulatory requirements and best practices in Nuclear.</li> <li>○ A substantial record of scientific or engineering research and publications in Reactor Fuel engineering and Nuclear Waste management.</li> <li>○ an authorised scope of a similar nature being compiled by the tenderer.</li> </ul> </li> <li>• Confirmation that the tenderer was responsible for the reports / publications / programmes previously compiled.</li> </ul>	
	The tenderer shall plan to produce the deliverables as described in the works information of the contract within the required timelines.	<ul style="list-style-type: none"> <li>• Proposed resource plan showing the human resources available to the tenderer in the completion of the scope.</li> </ul>	

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	Qualitative Evaluation Criteria	Weighting (%)
	Company Profile (Experience in conducting engineering works)	25%
	Team experience and suitability	35%
	Scope of works as per the works information of the contract	40%
Discipline	Mandatory Evaluation Criteria (Gate Keepers)	Tender Deliverable
<b>Group 15 – Thermal Performance</b>	The tenderer shall have experience and its current staff should be competent and have sufficient experience in successfully completing work of a similar nature.	<ul style="list-style-type: none"> <li>References of companies where work similar to the development and implementation of the scope have been completed by tenderer and the contact information of an individual at the referenced company.</li> <li>A description of the scope of a similar nature being compiled by the tenderer.</li> <li>Confirmation that the tenderer was responsible for the scope previously compiled</li> </ul>
	The tenderer shall plan to produce the deliverables as described in the works information of the contract within the required timelines.	<ul style="list-style-type: none"> <li>Proposed resource plan showing the human resources available to the tenderer in the completion of the scope.</li> </ul>
	Qualitative Evaluation Criteria	Weighting (%)
	Company Profile (Experience in conducting engineering works)	25%
	Team experience and suitability	35%
	Scope of works as per the works information of the contract	40%
Discipline	Mandatory Evaluation Criteria (Gate Keepers)	Tender Deliverable
<b>Group 16 – Design Engineering</b>	The tenderer shall have experience and its current staff should be competent and have sufficient experience in successfully completing work of a similar nature.	<ul style="list-style-type: none"> <li>References of companies where work similar to the development and implementation of the scope have been completed by tenderer and the contact information of an individual at the referenced company.</li> <li>A description of the scope of a similar nature being compiled by the tenderer.</li> <li>Confirmation that the tenderer was responsible for the scope previously compiled.</li> </ul>

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		<ul style="list-style-type: none"> <li>Mechanical, Electrical, I&amp;C and Civil Engineers with similar plant design knowledge and experience.</li> </ul>	
	The tenderer shall plan to produce the deliverables as described in the works information of the contract within the required timelines.	<ul style="list-style-type: none"> <li>Proposed resource plan showing the human resources available to the tenderer in the completion of the scope</li> </ul>	
	<b>Qualitative Evaluation Criteria</b>	<b>Weighting (%)</b>	
	Company Profile (Experience in conducting engineering works)	25%	
	Team experience and suitability	35%	
	Scope of works as per the works information of the contract	40%	
<b>Discipline</b>	<b>Mandatory Evaluation Criteria (Gate Keepers)</b>	<b>Tender Deliverable</b>	
<b>Group 17 - Engineering Programme &amp; Safety Case</b>	The tenderer shall have experience and its current staff should be competent and have sufficient experience in successfully completing work of a similar nature.	The tenderer to provide: <ul style="list-style-type: none"> <li>Reference with description of the scope of a similar nature being compiled and implemented by the tenderer and the contact information of individual at the referenced department.</li> <li>Confirmation that the tenderer was responsible for the scope previously compiled.</li> <li>Koeberg Nuclear Power Station specific preferably in Nuclear Engineering, Operating, or Safety Engineers group.</li> <li>Mechanical, Electrical, I&amp;C and Civil Engineers with KNPS (Koeberg Nuclear Power Station) specific plant design knowledge and experience.</li> </ul>	
	The tenderer shall plan to produce the deliverables as described in the works information of the contract within the required timelines.	<ul style="list-style-type: none"> <li>Proposed resource plan showing the human resources available to the tenderer in the completion of the scope.</li> </ul>	
	<b>Qualitative Evaluation Criteria</b>	<b>Weighting (%)</b>	
	Company Profile (Experience in conducting engineering works)	25%	
	Team experience and suitability	35%	
	Scope of works as per the works information of the contract	40%	
<b>NB: The assessment of the Mandatory Evaluation Criteria (Gate Keepers) is conducted as follows:</b>  <b>A tenderer is scored a YES or NO, based on their response.</b>			

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**An assessment of "NO" on any of the criteria above shall technically disqualify the tenderer and shall not be further evaluated against Qualitative Evaluation Criteria.  
An assessment of "YES" for all of the criteria above means that the tenderer's submission will be evaluated further against the Qualitative Evaluation Criteria.**

**Tenderers who do not meet the threshold for functionality scoring will be disqualified and not be evaluated further.**

3.15 Evaluation of price	<p>Based on the recommendations of the functionality evaluations, a report will be submitted to the delegated approval committee on all suppliers recommended for the panel. Once approval is granted, all suppliers will be placed on a list of approved suppliers with which Eskom can request quotations from; through mini tenders OR RFQs.</p> <p>Prices for these mini tenders will be evaluated as follows:</p> <ul style="list-style-type: none"> <li>• Inclusive of VAT</li> <li>• Making the specified correction for arithmetical errors</li> </ul> <p>Prices will be scored out of 90/80 points</p>
3.17 Evaluation of Specific Goals	<p>Specific goals will be determined at the Task Order Level.</p> <p>Note:</p> <p><b>Failure on the part of the supplier to submit supporting documents/proof of specific goals for purposes of evaluation and scoring by RFQ closing will not result in disqualification (if tenderer is otherwise deemed to be responsive/acceptable in all other aspects). The tenderer will, however, be scored zero for Specific goals for purposes of PPPFA scoring and ranking.</b></p>
3.18 Ranking of tenders	<p>For these mini tenders, suppliers will be ranked by applying the preferential point scoring based on the relevant system as stipulated hereunder]:-</p> <p>Suppliers will be ranked by applying the preferential point scoring based on the relevant system as stipulated hereunder]:-</p> <ol style="list-style-type: none"> <li>1. 90/10 for tender with a rand value above R50 million or</li> <li>2. 80/20 for tender with rand value equal to or below R50 million</li> </ol> <p>Eskom will then add the score from Pricing and the B-BBEE level together and rank the suppliers from the highest to the lowest.</p>
3.19 Objective Criteria (if applicable)	Objective criteria <b><i>are applicable at Task Order Level</i></b>

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Compliance to Objective criteria is Mandatory.  
Failure to comply with Objective will render the tender non-responsive.

The following objective criteria apply:-

- Designated material and thresholds [is applicable/ not applicable ]

If applicable stipulate which materials are identified as designated materials and what thresholds the tenderers must meet in order to be evaluated further.

Material	Threshold %

Tenderers need to complete and submit Annexure F1-F4 hereto as evidence of compliance with this requirement.

The dti has appointed SABS as the official verification agency for local content in terms of designated products

A tender that fails to meet the minimum stipulated threshold for local production and content will not be justified for award.

- Valid B-BBEE certificate issued by an authorized body or person; a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; any other requirement prescribed in terms of the Broad-Based Black Economic

- NIPP Requirements ***will be determined at Task Order Level***


Eskom will implement the NIPP requirement, which determines that the contractor/supplier has to contact the Department of Trade, Industry and Competition (dtic) to arrange for support and development of local businesses. Eskom is required to inform the tenderers of this requirement. NIPP will only be applicable for contracts with an FGN component or content of USD 5 million or more.

- CIDB Contract Participation Goal (CPG) ***will be determined at Task Order Level***

Contractor shall achieve in the performance of the contract the Contract Participation Goals (CPG) relating to the engagement of targeted enterprises as established in the CIDB Standard for Indirect Targeting for Enterprise

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	<p>development through Construction Works Contract ( published in GN No. 36190 of 25 February 2013).Contract Participation Goals is only applicable in Grade 7-9 General Building (GB) and Civil Engineering (CE) contracts where the contract duration is 6 months or more.</p> <ul style="list-style-type: none"> <li>CIDB Contract skills development goals (CSGD) <b>will be determined at Task Order Level</b></li> </ul> <p>Contractor shall achieve in the performance of the contract the CSDG established in the CIDB Standard for Developing Skills through Infrastructure contracts (published in GGN 36760 of March 2020) CSDG is applicable to all classes of works exceeding R60 M and where the contract duration is 12 months or more or to Professional Services/Service contract/order where the estimated contract exceeds R5M and where the contract duration is 12 months or more]</p> <p><b>Please note:-</b></p> <ol style="list-style-type: none"> <li><b>Eskom reserves the right to award to a tenderer who may not be the highest scoring/highest ranked tenderer, in line with Section (2) (1) (f) of the PPPFA</b></li> <li><b>Functionality and elements of Contractual requirements must not be used as objective criteria.</b></li> </ol>
3.20 Reverse e-auction (if applicable)	Reverse e-auction <b>is not applicable</b>
<b>Contractual Requirements</b>	
<p>Contractual Requirements include the following:</p> <ul style="list-style-type: none"> <li>SHE Requirements;</li> <li>Quality Requirements and</li> <li>Financial statements</li> </ul> <p><b><u>Occupational Health and Safety (OHS) Requirements</u></b></p> <p>Occupational Health and Safety (OHS) falls under contractual requirement which means the suppliers will submit the tender returnable during the tender close-out. The evaluation will take place once the Mandatory and Functionality evaluations have been completed. Only the shortlisted suppliers who passed mandatory and functionality evaluation threshold will be evaluated. The suppliers will be given only ONE opportunity to submit the outstanding documents within 7 working days. Failure to submit the outstanding documents within the stipulated time; may result in the tenderer being regarded as non-responsive and ineligible for contract award. The service provider will be expected to comply with the site specific OHS requirements, submit the SHE file for approval and to go through site specific induction.</p> <p>Below are the Occupational Health and safety requirements that the tenderers must comply with:</p>	

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#### ❖ **Annexure B**

The acknowledgement of Eskom's OHS legal and other requirements form (Annexure B) to be signed and submitted by tenderer

#### ❖ **Health and Safety Plan**

Health and Safety Plan (must address the project /scope of work OHS risk(s) and aligned with the health and safety specification or requirements)

The OHS Plan to include the following but not limited to:

- OHS organization structure (organogram)OHS Incident management
- PPE- Personal Protective Equipment
- Vehicle and driver behaviour safety
- Competency, training, appointments
- Communication and awareness
- Medical Surveillance program
- Management commitment and visible felt leadership

The Health and Safety Plan to also include COVID 19 Requirements such as:

- COVID 19 management Plan
- COVID 19 Risk assessment
- COVID 19 Policy

#### ❖ **Costing for Health and Safety management**

Has the tenderer submitted detailed costing for OHS (the cost should be broken down not provided as a lump sum).

- The costing must be based on the overall scope of work/service to be performed;
- The scope of work and the risk assessment may serve as a guideline.
- The costing must be relevant to the requirements of the OHS specification

#### ❖ **Baseline OHS Risk Assessment (BRA)**

Identification, assessment and management of OHS risks related to the scope of work. The methodology used for the risk assessment must be provided together with the BRA

#### ❖ **Valid Letter of Good Standing (COLDA or equivalent)**

#### ❖ **OHS policy signed by CEO**

The submitted policy must comply to OHS Act Section 7

#### ❖ **OHS Competency (Consider scope of work, risks, OHS plan and applicability) CV's and qualifications / certificates (List competencies required)**

The competency must be relevant to the requirements of the OHS specification.


#### **Environmental Requirements**

<b>REFERENCE DOCUMENTATION</b>	<ul style="list-style-type: none"> <li>• SHEQ Policy: 32-727</li> <li>• NEMWA, Norms and Standards Regulations- R634 to R636</li> <li>• Waste Management Engineering Design checklist</li> </ul>
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	<ul style="list-style-type: none"> <li>• Checklist for Department of Water and Sanitation Record of Decision</li> <li>• Capping closure checklist</li> <li>• Environmental Authorisation conditions- <b>where applicable</b></li> <li>• Water Use License aconditions- <b>where applicable</b></li> <li>• Waste Mangement License conditions - <b>where applicable</b></li> <li>• Detailed designs approval conditions – <b>where applicable</b></li> <li>• Construction completion approval conditions- <b>where applicable</b></li> <li>• Emission monitoring and reporting standard</li> </ul>	
<b>Environmental Requirements</b>	<p>Technical input into the following:</p> <ul style="list-style-type: none"> <li>• Environmental Impact Assessment applications including engineering related specialist studies</li> <li>• Water Use License Applications</li> <li>• Integrated Water and Waste Management Plans</li> <li>• Rehabilitation and closure plans</li> <li>• Compliance to Dam Safety Regulations</li> <li>• Storm Water Management plans</li> <li>• Rain Readiness Plans</li> <li>• Flood line determination</li> <li>• Environmental Risk Assessment</li> <li>• Development of EMPs taking into account permit requirements and environmental aspects and impacts</li> <li>• Development of activity method statements</li> <li>• Compile information as required by environmental screening checklist 240-43921804</li> <li>• Development of activity method statements</li> <li>• Hazard Operability analysis</li> <li>• Compliance to Regulations R634 and R635, norms and standards for the assessment of waste for landfill disposal</li> <li>• Compliance to NEMWA Regulations 2013 R636, Regulation 3: Landfill Classification and Containment Barrier Design</li> <li>• Compliance to the check list of Information Available in the Design Report for Confirming Performance of Containment Barrier Systems</li> <li>• Compliance to the Department of Water and Sanitation checklist for the Record of Decision to be processed</li> <li>• Compliance to the capping closure checklist</li> <li>• Compliance to Section 28 (duty of care principles)</li> <li>• Atmospheric Emission License processes (dispersion modeling)</li> <li>• Emission inventory preparation</li> <li>• Emission monitoring and reporting</li> <li>• Technical advice/support in respect of emission management</li> </ul>	

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ENVIRONMENTAL EVALUATION CRITERIA		
Relevant Qualification, Experience and professional registration	SCORE	
Experience and professional registration	Maximum	Actual
<p>Experience, scientific standing with the fields of expertise and depth of the experience of the team members, in relation to the project of similar nature. Preference will be given to service providers who are registered / certified by relevant professional body in the field.</p> <p><b>Relevant Qualifications (10%)</b> Engineering related qualification</p> <p><b>Relevant experience (10%)</b> This experience must be clearly detailed in the CV provided. (Individual experience; experiences with previous projects. Demonstrate completion of projects within time, costs and scope. &gt;5 yrs exp = 10; &gt;5 yrs to 13 years = 20; and &gt;13 yrs to 20 = 30).</p> <p><b>Professional registration (10%)</b> Engineering related professional registration</p>		
<b>Acknowledgment to provide technical input into environmental requirements (70%)</b>		
<b>Final Score Total</b>	<b>Maximum Total</b>	<b>Actual Total</b>
FINAL SCORE PERCENTAGE (%)		
<p style="text-align: center;"><b>THRESHOLD</b></p> <p>The score that each tenderer receives will provide a numeric basis for tender comparison. The minimum weighted average score required for a tender to be considered must be <b>80%</b> or above.</p>		

### Quality Requirements

- Nuclear Quality Requirements**

The Panel Contract will be concluded and signed with QM-58 Quality Requirements ONLY and there will be NO separate panel contract specifically for Nuclear.

The classification of the works for Nuclear Operating Unit (NOU) will be performed at Task Order level or RFQ (for mini tender) when the scope of work to be drawn from the established Panel Contract can be clearly defined.

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Once the Classification of the Works is done, Nuclear Commercial (PQE) will be able to assign the Koeberg Quality Specifications and Quality Requirements based on the assigned classification. At this stage, should it be established that the Panel supplier that is interested in the Task Order is not listed in the NOU Approved Suppliers List for the applicable scope of work, a Supplier Qualification will be performed in accordance with Procedure 238-105 on the preferred supplier. The involvement of the National Nuclear Regulator (NNR) in the Qualification process will therefore be considered depending on the assigned Quality Specification.


Should the NOU scope need not be satisfied by the established Panel Contract, the NOU will have to satisfy their need in any other manner following the Eskom hierarchy of procurement.

**NB: The tenderers should therefore NOTE that the Quality requirements below (QM-58 Quality Specification), which are based on ISO 9001:2015 will apply to all the tenderers inclusive of Nuclear. Koeberg Quality Specifications and Quality Requirements will therefore be specified at Task Order level or RFQ (for mini tender) stage (for all Nuclear Panel members) to draw from the established Panel Contract OR satisfy their need as per the Eskom hierarchy of procurement.**

<b>Category 2 : Quality Requirements</b>	<b>Deliverables to be evaluated indicator = 1</b>	
<b>SECTION A: Quality Management System Requirements ISO 9001</b> <b>(Option 1) Valid certification of Quality Management System by an ISO accredited body</b>		
		<b>Apply =1</b>
A.1 Product / Service Scoping on ISO 9001 certificate is defined and relevant		1
A.2 Certificate by Approved and Authorized certification authority		1
A.3 Certification Authority has Recognized International Accreditation		1
A.4 Validity (expiry date) of certificate		1
<b>Section A Score Option 1</b>		<b>4</b>
<b>SECTION A: Quality Management System Requirements ISO 9001</b> <b>(Option 2) Objective evidence of documented QMS that is not certified but complies with ISO 9001</b>		
		<b>Apply =1</b>
A.1 QMS Manual or a document that defines and describes the QMS and its scope		1
A.2 Quality Policy Approved by top management.		1
A.3 Quality Objectives Approved by top management.		1

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A.4 Control of documented information (i.e. document and record control) Clause 7.5 of ISO 9001:2015	1
A.5 Documented information for Control of nonconforming outputs Clause 8.7 of ISO 9001:2015	1
A.6 Documented information for Nonconformity and Corrective action Clause 10.2 of ISO 9001:2015	1
A.7 Documented information for Internal audit Clause 9.2 of ISO 9001:2015	1
<b>Section A Score Option 2</b>	<b>7</b>
<b>SECTION B: Evidence of QMS in operation (Tender Quality Requirements -Ref 240-105658000)</b>	
	<b>Apply =1</b>
B.1 Documented information for defined roles, responsibilities and authorities - Organization chart and Responsibility matrix (must include but not limited to quality management function/role)  (Clause 5.3 of ISO 9001:2015)	1
B.2 Documented information for Control of Externally Provided Processes, Products and Services - Must include criteria for evaluation, selection, monitoring of performance, and re-evaluation of external providers (Clause 8.4 of ISO 9001:2015)	1
B.3 Latest copy of an internal management system audit report (with Nonconformity, Correction and/ or Corrective Action Reports) - Report must include but not limited to Objective, Scope, Criteria and outcomes of the audit.  (Clause 9.2 of ISO 9001:2015)	1
B.5 Records of Management Review meetings (minutes, attendance registers etc.)	1
<b>Section B Score</b>	<b>4</b>
<b>SECTION C: Contract Quality Plan Requirements (Ref 240-105658000 and 240-109253698). Draft Contract Quality Plan specific to the scope of work as described in the tender documents (Ref ISO 10005)</b>	
	<b>Apply (Yes=1)</b>

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NB! Draft Contract/Project Quality Plan has important QA deliverables	1
<b>Section C Score</b>	<b>1</b>
<b>SECTION E: User defined additional Requirements &amp; miscellaneous (Ref 240-105658000)</b>  <b>Customer specific requirements &amp; other standards and required can be listed and evaluated here</b>	
	<b>Apply (Yes=1)</b>
E.1 Form A is completed and signed.	1
<b>Section E Score</b>	<b>1</b>

### Financial Statement Analysis

Financial Statements are required for the tenderer that will be awarded the contract. An analysis of the tenderers' financial statements will be conducted for the purposes of establishing the tenderers' financial viability and ability to meet all of its contractual obligations for the duration of the contract; should the tenderer be awarded the contract. Should the supplier fail to submit this at tender submission date, the said supplier will not be disqualified.

#### **Please Note:**

**Contractual requirements are not evaluation criteria. They are required to be met and assessed after the evaluation and ranking of the tenders. Proof that the highest ranked tenderer is able to meet the contractual requirements, must be submitted prior to contract award.**


**Failure to meet "Contractual Requirements "by the stipulated deadlines; may result in the tenderer being regarded as non-responsive and ineligible for contract award.**

**In the event that there are further documents/actions that are required during execution of the contract, these must be made contractual conditions and compliance thereto must be managed in terms of the contract.**

2.25Contractual Condition	<p>The conditions of contract will be the <b>NEC3 Professional Services Contract with the following clauses:</b></p> <p><b>Main Option</b> Option G: Term Contract</p> <p><b>Dispute resolution Option W1</b> Dispute resolution procedure</p>
---------------------------	--

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	<b>Secondary Clauses</b> X1: Price adjustment for inflation X2: Changes in the law X3: Multiple currencies X7: Delay damages X9: Transfer of rights X10: Employer's Agent X11: Termination by the Employer's Agent X18: Limitation of liability Additional Clauses: Z Clauses
CIDB Requirements (where applicable for Engineering and Construction Works Contracts)	CIDB Requirements <b><i>are not applicable</i></b>

**Please note:**

Tenderers are requested to bear in mind Eskom's standard payment terms as stipulated hereunder when submitting tenders and concluding contracts with Eskom:

For contracts valued below R50 000 000 (Fifty Million Rand) including VAT, Eskom is committed to paying Suppliers within 30 days of receipt of undisputed invoices.

For contracts valued above R50 000 000 (Fifty Million Rand) including VAT, Eskom is committed to paying suppliers within 60 days of receipt of undisputed invoices.

Eskom reserves the right to negotiate with preferred bidders after a competitive bidding process or price quotations; should the tendered prices not be deemed market-related.

Main contractors/ suppliers are discouraged from subcontracting with their subsidiary companies as this may be interpreted as subcontracting with themselves and / or using their subsidiaries for fronting. Where a main contractor subcontracts with a subsidiary this must be declared in tender documents.


A report containing a list of potential sub-contractors may be drawn by accessing the following link: [www.csd.gov.za](http://www.csd.gov.za)

“proof of B-BBEE status level of contributor” means-

(a) the B-BBEE status level certificate issued by an authorised body or person; or

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(b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or

(c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act;

### 1.3 **TENDER RETURNABLES**

The tenderer must submit the returnable set out hereunder as part of its tender at the stipulated deadline.

#### **NOTE:**

**\* Returnable required at Tender closing (disqualifiable) - These returnable are required to be fully completed, signed (if required on the returnable) and submitted with the tender at Tender closing date and time. If not fully completed, signed (if required on the returnable) and/or submitted by tender closing the tender must be disqualified.**

**\*\* Returnable required at Tender closing. (Non-disqualifiable) – These returnable are also required to be fully completed, signed (if required on the returnable) and submitted with Tender at Tender closing date and time, however, if not submitted by Tender closing, the Procurement Practitioners must request in writing the outstanding returnable to be submitted within 5 working days. If the requested returnable are not fully completed, signed (if required on the returnable) and/or received by the Procurement Practitioner within 5 working days of the request; the tender must be disqualified. The 5 working days requirement does not apply to CIDB proof of grading. (Refer to the returnable table under CIDB reference for prescribed period)**

**# These returnable are mandatory for evaluation and therefore required at tender closing time and date. These will not be requested by the Procurement Practitioner, however the tenderer will not be disqualified but score zero.**

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Reference	Returnable From Suppliers	Returnable required at Tender closing (disqualifiable)*	Returnable required at Tender closing. (Non-disqualifiable) **	Returnable required prior to Contract Award.
<b>Basic Compliance</b>	TWO (2) hard copies of the tender; ONE (1) original and ONE (1) complete, exact copy of the original tender.	✓		
<b>Annexure A</b>	Acknowledgement Form		✓	
<b>Annexure B</b>	Tenderers Particulars		✓	
<b>Annexure C</b>	Integrity Pact Declaration form		✓	
<b>Annexure D</b>	CPA for local goods/services (if applicable)	Not Applicable		
<b>Annexure E</b>	CPA(IG) for imported goods/services (if applicable)	Not Applicable		
<b>Annexure G</b> (applicable for all suppliers including Foreign suppliers)	SBD 1- to be completed and submitted by all tenderers.			✓
<b># Annexure H</b>	SBD 6.1- Preference Points Claim Form in terms of PPPFA 2022 regulations	Not Applicable		
<b>Annexure I</b>	SBD 4 – Bidders Disclosure		✓	
Reverse e-auction training acknowledgement form (if applicable)		Not Applicable		
<b>Additional Documents required in event of JV:-</b>	Letter of intent to form a JV/consortium or Valid joint venture agreement confirming the rights and obligations of each of the joint venture partners and their profit-sharing ratios.		✓	
	Separate written confirmation that the joint venture will operate as a single business entity (incorporated) for the duration of the contract or this may be included as an obligation within the JV agreement.		✓	
	# proof of compliance to the stipulated Specific goals.			

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	Details and confirmation of a single designated bank account in the name of the JV and independent of the individual JV partners, as set out in the joint venture agreement.			✓
# Specific Goals	Failure on the part of the supplier to submit “ <b>proof of specific goals</b> for purposes of evaluation and scoring by the tender closing will not result in disqualification (if tenderer is otherwise deemed to be responsive/acceptable in all other aspects ). The tenderer will, however, be scored zero for Specific goals for purposes of PPPFA scoring and ranking.	Applicable at Task Order Level		
Tax Clearance Certificates	A certified copy of a tax clearance certificate is still required by Foreign suppliers (with a footprint in South Africa- but who are not on CSD and have not provided a SARS pin number ) and Local suppliers (who have not provided their SARS e-filing PIN number for verification by Eskom and/or their CSD profile / CSD number) . Foreign suppliers with no footprint in South Africa, must still complete the SBD1 document, however no proof of tax compliance is required.			✓
Tax Evaluation Questionnaire (if services contract and was included as annexure)	Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE]			✓
Compliance with Employment Equity Act	To the extent that the tenderer falls within the definition of a “designated Employer” as contemplated in the Employment Equity Act 55 of 1998, the tenderer is required to furnish the Employer with proof of compliance with the Employment Equity Act, including proof of submission of the Employment Equity report to the Department of Labour. (South African tenderers only)			✓
CIDB (where applicable)	Valid proof of the required cidb grading designation for the main contractor; JV and /or sub-contractor as may be required in the tender data at tender closing deadline or within 21 working days from the closing date of submission of tenders if this is agreed with the Employer		✓	
NEC/FIDIC Documentation	Completed NEC/FIDIC pricing schedule and contract data.			✓
Additional documents required (ECSA/ SACPCMP/CVs/ permits/licenses/ specific		✓		

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<b>registration documents (if applicable to scope of work)</b>				
	<b>DOCUMENTS REQUIRED UNDER CONTRACTUAL REQUIREMENTS (WHERE CONTRACTUAL REQUIREMENTS ARE STIPULATED)</b>			
<b>Safety</b>	COIDA - Original certificate of good standing or proof of application issued by the Compensation Fund (COID) or a licensed compensation insurer (South African tenderers only)			✓
<b>Quality</b>	Documents that may be required per scope of work			✓
<b>Other safety/quality documents as required per scope of works</b>				✓
<b>Environmental</b>	Documents that may be required as per scope of work			✓
<b>Due Diligence</b>	Audited Financial Statements of the <i>tenderer</i> for the previous 18 months, or to the extent that such statements are not available, for the last year. Tenderers must note that in the case of a joint venture or special purpose vehicle (SPV) especially formed for this tender, audited financial statements for each participant in the JV / SPV is required. Start-up enterprises formed within the last 12 months are not required to send in statements, but if successful with their tender will be required to send statements for the first year when once available.			✓
	<b>DOCUMENTS REQUIRED UNDER FUNCTIONALITY/TECHNICAL CRITERIA</b>			
Technical (required functionality scoring)	<b>1. Table 6 (ANNEXURE K) Categorization and grouping of services</b>	Tenderers must indicate which Panel, category and or grouping they have tendered for. They must as well mark their choices accordingly on their submissions' files (both hard and soft copies using Table 6 (Annexure K).	✓	
	<b>2. Proof of membership of consulting company with CESA</b>	The Service Providers to submit CESA membership of the consulting company	✓	
	<b>3. Technical Evaluation Criteria</b>	NB: Technical Evaluation to be clearly understood by the tenderers. In case the	✓	

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		Technical Evaluation Criteria requires to be completed, failure to do so and in full will lead to disqualification (that is, some evaluations are dependent on the tenderer/s completing some information on some technical evaluation criteria templates/ spreadsheets).			
--	--	---	--	--	--

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## **ANNEXURE A**

### **ACKNOWLEDGEMENT FORM**

We are in receipt of the Invitation to Tender/Proposal from Eskom Holdings SOC Ltd and the following addenda issued by Eskom:


We confirm that the documentation received by us is: **(Indicate by ticking the box)**

Correct as stated in the Invitation to Tender / RFP Content List, and that each document is complete. ☐

Or: Incorrect or incomplete for the following reasons: ☐

---



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### **Cataloguing Acknowledgement:**

**[Please select the relevant statement by ticking the appropriate box below]:**

1. We agree to provide the cataloguing information as described in the *tender submission*. ☐
2. We have already supplied Eskom with the cataloguing information pertaining to this enquiry in a previous contract/order [***insert previous invitation to tender/RFQ number***] ☐ \_\_\_\_\_
3. We do not intend to provide the cataloguing information for the required scope / specifications. for the reasons stated hereunder: ☐

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4. I confirm that I am a Distributor/Importer/Agent and my Principal, being the Original Equipment Manufacturer (OEM) is or is not in the position to supply cataloguing information for items. See attached letter from OEM confirming his position. ☐

Invitation to Tender/Request for Proposal No: \_\_\_\_\_

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Name of company/JV: \_\_\_\_\_

Country of registration: \_\_\_\_\_

Name of contact person: \_\_\_\_\_

Contact details of contact person:

Tel (landline):	
Cell phone:	
e-mail address:	

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## **ANNEXURE B**

### **TENDERER'S PARTICULARS**

The *tenderer* must furnish the following particulars where applicable:

Indicate the type of tendering structure by marking with an 'X' (where applicable provide registration number):	
Individual tenderer	
Unincorporated Joint venture (registration number for each member of the JV)	
Incorporated JV	
Other	

Please complete the following:


Name of lead partner/member in case of JV	
CIPC Registration Number or CIPC disclosure certificate (for each individual company / JV member)	
VAT registration number (for each individual company / JV member)	
CIDB registration number (for each individual company/JV member if applicable), respective contractor grading designation for each individual company/JV member , and combined cidb contractor grading designation (for JVs)	
Contact person	
Telephone number	
E-mail address	
Postal address (also of each member in the case of a JV)	
Physical address (also of each member of the JV)	

If subcontractors are to be used, indicate the following for the main sub-contractor(s). Add to the list of applicable.

Name of contractor	
CIPC Registration number or CIPC disclosure certificate	
VAT registration number	
CIDB Registration number (if applicable) and CIDB grade specified for the sub-contractor as may be stipulated in the Tender Data	
Proposed Scope of work to be done by sub-contractor	

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Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

1. If you are currently registered as a vendor with Eskom, please provide your Vendor registration number with Eskom. \_\_\_\_\_
2. If you are currently registered as a vendor on the Treasury Central Supplier Database(CSD) please provide your supplier registration number with Treasury \_\_\_\_\_
3. Please note that it is mandatory for you to register on National Treasury's CSD, if you intend doing work with any State department or State owned entity/company.
4. You may register online at National Treasury website on [www.treasury.gov.za](http://www.treasury.gov.za)
5. If you are registered on SARS Efiling system, please provide your pin number in order to verify your tax compliant status \_\_\_\_\_
6. If you are required to be tax compliant as per SBD 1, but are not registered on CSD ( foreign suppliers) or have not provided your SARS Efiling pin, please confirm that you have attached/will send a copy of a current valid tax compliant certificate as a tender returnable (by contract award stage).

YES		NO	
-----	--	----	--

8. If sub-contracting is prescribed in the specific enquiry, you need to complete 8.1- 8.7

8.1 Confirm if you intend sub-contracting

YES		NO	
-----	--	----	--

8.2 What percentage will you be sub-contracting? \_\_\_\_\_%


8.3 To whom do you intend sub-contracting? \_\_\_\_\_

8.4 Is the said sub-contractor registered on CSD?

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YES		NO	
-----	--	----	--

8.5 If yes to 8.4, please provide CSD number. \_\_\_\_\_

8.4 Please confirm B-BBEE level of said sub-contractor \_\_\_\_\_

8.5 Which designated group does the sub-contractor belong to:-

- a) An EME or QSE;
- b) An EME or QSE which is at least 51% owned by black people;
- c) An EME or QSE which is at least 51% owned by black people who are youth;
- d) An EME or QSE which is at least 51% owned by black people who are women;
- e) An EME or QSE which is at least 51% owned by black people with disabilities;
- f) An EME or QSE which is 51% owned by black people living in rural or underdeveloped areas or townships;
- g) A cooperative which is at least 51% owned by black people;
- h) An EME or QSE which is at least 51% owned by black people who are military veterans; or
- i) More than one of the categories referred to in paragraphs (a) to (h).

8.6 Please confirm that you have attached your signed intent to sub-contract document.

YES		NO	
-----	--	----	--

8.7 Have you attached proof of sub-contractor's belonging to designated group

YES		NO	
-----	--	----	--

## 1. Single tenderers


I, the undersigned, \_\_\_\_\_ (Full names) hereby confirm that I am duly authorised to sign all documents in connection with this tender and any contract resulting from it, on behalf of \_\_\_\_\_ (*insert the full legal name of the tenderer*).

Signature: \_\_\_\_\_

Designation: \_\_\_\_\_

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Date: \_\_\_\_\_

## 2. Joint Ventures


We, the undersigned, are submitting this tender in Joint Venture and hereby authorise Mr/Ms \_\_\_\_\_ (full names), an authorised signatory of \_\_\_\_\_, *(insert the full legal name of the business entity serving as the lead partner)* acting in the capacity of lead partner, to sign all documents in connection with the tender and any contract resulting from it on our behalf.

We attach to this Schedule a copy of the joint venture agreement which incorporates a statement that all partners are liable jointly and severally for the execution of the contract and that the lead partner is authorised to incur liabilities, receive instructions and payments and be responsible for the entire execution of the contract for and on behalf of any and all the partners.

<b>Legal Name of Joint Venture Member</b>	<b>Full Name and Capacity of Authorised Signatory</b>	<b>Signature</b>

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## **ANNEXURE C**

### **INTEGRITY DECLARATION FORM**

***Note: This returnable is required to be fully completed, signed and submitted by tenderers at the stipulated deadlines.***

#### **DECLARATION OF INTEREST**

I/We understand that any natural/legal person, including employees of the State and/or those related to an Eskom employee/director (as per the definition of “related” set out hereunder), may tender to Eskom. However, in view of possible allegations of favouritism (the practice of showing favour to, or giving preference to some person/group, to the detriment of, or at the expense of another that is entitled to equal treatment or an equal opportunity), should the resulting tender, or part thereof, be awarded to such natural/legal person, as described herein, it is required that the *tenderer/s* declare such interest/relationship where:-

1. the *tenderer/s* employees/directors are also employees/contractors/consultants/ directors in the state or a state owned entity.
2. the *tenderer/s* employees/directors are also employees/contractors/consultants/ directors of Eskom
3. the *tenderer/s* employees/directors are also employees/contractors/consultants or directors in another entity together with Eskom employees/consultants/contractors/ directors
4. the *legal person/s (including its employees/contractors/directors/members/ shareholders)* on whose behalf the tender documents are signed, is in some other way “related” to an Eskom employee/contractor/consultant/director involved in the tender evaluation/tender adjudication/tender negotiation. “Related” meaning that:-
  1. an individual is related to another individual if they are married, or live together in a relationship similar to marriage;
  2. or are separated by no more than two degrees of natural or adopted consanguinity or affinity;
  3. an individual is related to a juristic person if the individual directly or indirectly controls the juristic person, as determined in accordance with the definition of “control” (as per Companies Act section 2(1)) ; and


#### **1.a juristic person is “related” to another juristic person if:-**

1. either of them directly/indirectly controls the other, or the business of the other, as determined in accordance with the definition of “control” (as per Companies Act section 2(1) );
2. either is a subsidiary of the other; or
3. a person directly/indirectly controls each of them, or the business of each of them, as determined in accordance with the definition of “control”
5. the *tenderer/s* and one or more of the *tenderers* in this tendering/RFP process have a controlling partner in common, or a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another tenderer, or influence the decisions of Eskom regarding this bidding process;

To give effect to the provisions above, please complete the table hereunder with all required information.

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Full Name & Capacity/ Position within tenderer (e.g. employee/Director/member/ owner/shareholder)	Identity Number	Confirm and provide details (including employee number) if you are a State/State owned entity employee/contractor/ director.	Full Names & Capacity/Position of Eskom employee/ director/ consultant and details of the relationship or interest (marital/ familial/personal/ financial etc.)	To your knowledge is this person involved in the evaluation/ adjudication/ negotiation of tenders

1. If any employee/director/member/shareholder/owner of tenderer/s is also currently employed by Eskom, state whether this has been declared and whether there is authorisation(Y/N) to undertake remunerative work outside public sector employment and attach proof to this declaration.

Do the tenderer/s and other tenderer in this tendering/RFP process share a controlling partner or have any relationship with each other, directly or through common third parties? (Y/N) If Yes, attach proof to this declaration.

## 2. DECLARATION OF FAIR TENDERING PRACTICES

This serves as a declaration that when goods/services are being procured, all reasonable steps have been taken to address and/or prevent the exploitation of the procurement process and the use of any unfair tendering practices.


A **[tender/proposal]** will be disqualified if the *tenderer/s*, or any of its directors have:

1. abused the institution's procurement process (e.g. bid rigging/collusion)
2. committed fraud or any other improper conduct in relation to such system.

Please complete the declaration with an 'X' under YES or NO

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Item	Question	Yes	No
1.1	<p>Is the <i>tenderer/s (or any of its directors/members/shareholders)</i> listed on National Treasury's Database of Restricted Suppliers as companies/persons prohibited from doing business with the public sector</p> <p><b><i>[Note: Companies/persons who are listed on the Database were informed in writing of this restriction by the Authority/Accounting Officer of the institution that imposed the restriction after the audi alteram partem rule was applied].</i></b></p> <p>The Database of Restricted Suppliers can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>).</p>		
1.2	<p>Is the <i>tenderer/s (or any of its directors / members / shareholders)</i>? listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combatting of Corrupt Activities Act (No 12 of 2004)</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>).</p>		
1.3	Was the <i>tenderer/s (or any of its directors/members/shareholders)</i> convicted by a court of law (including a court outside South Africa) for fraud and/or corruption with respect to the procurement/tendering processes/procedures during the past five years?		
1.3.1	Provide details.		
1.4	Was the <i>tenderer/s(or any of its directors/members/shareholders)</i> prohibited from doing business with any International Financial Development/funding Agency or Lending Institution		
1.5	<i>Is there any history/record of the tenderer/s (or any of its directors/members/shareholders) failing to meet their contractual obligation with any SOC?</i>		

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### 3. DECLARATION OF SHAREHOLDING INFORMATION

I, the undersigned \_\_\_\_\_ [Position] \_\_\_\_\_ hereby declare that I am the duly authorised representative of \_\_\_\_\_ [Name of Tenderer].

I further declare that the following individuals and/or entities listed hereunder are Shareholders in \_\_\_\_\_ [Name of Tenderer]:

***Note that this information in the tables hereunder must be fully completed for each tenderer (including incorporated JVs). In event that the tenderer is an unincorporated JV, this must be completed for each JV member. Please add additional rows if required.***

#### Individuals:

Full Name	Identity Number	Shareholding Percentage

#### Other Entities\*:

Full Legal / Trading Name	Registration Number/Trust Number	Shareholding Percentage	Full name and surname of the directors/beneficiaries/shareholders of the shareholding entity	Identification Numbers of the shareholders/directors/beneficiaries of the shareholding entity

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I, the undersigned, \_\_\_\_\_ (full names) hereby confirm that I am duly authorised to sign all documents in connection with this tender and any contract resulting from it on behalf of \_\_\_\_\_ (insert the full legal name of tenderer).

I declare that I have read and understood the provisions of the Supplier Integrity Pact, that all information furnished herein is correct, that it is understood that the tenderer's tender/proposal may be rejected, and that Eskom will act against the tenderer should any aspect of this this declaration prove to be false, and

I give my consent for this information to be used for the purpose as described in this Integrity Declaration Form and/or in relation to the Supplier Integrity Pact, and

I further consent that information provided in terms of this Integrity Declaration Form may be processed for verification of conflicts of interest and other ancillary purposes by Eskom. Such processing may include the sharing of the information with third parties.

<b>Signature:</b>	
<b>Designation and capacity in which signing</b>	
<b>Date:</b>	

### **Joint Ventures**


I, the undersigned, \_\_\_\_\_ (full names) hereby confirm that acting in the capacity of lead partner, I am duly authorised to sign all documents in connection with the tender and any contract resulting from it on behalf of \_\_\_\_\_ (insert the full legal name of the JV); and

I declare that I have read and understood the provisions of the Supplier Integrity Pact, that all information furnished herein is correct, that it is understood that the JV's tender/proposal may be

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rejected, and that Eskom will act against the JV should any aspect of this declaration prove to be false; and

I give my consent for this information to be used for the purpose as described in this Integrity Declaration Form and/or in relation to the Supplier Integrity Pact, and


I further consent that information provided in terms of this Integrity Declaration Form may be processed for verification of conflicts of interest and other ancillary purposes by Eskom. Such processing may include the sharing of the information with third parties.

<b>Signature:</b>	
<b>Designation and capacity in which signing</b>	
<b>Date:</b>	

(A copy of the joint venture agreement which incorporates a statement that all partners are liable jointly and severally for the execution of the contract and that the lead partner is authorised to incur liabilities, receive instructions and payments and be responsible for the entire execution of the contract for and on behalf of any and all the partners is attached to the invitation to tender/Request for proposal).

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## **ANNEXURE D**

### **CPA REQUIREMENTS FOR LOCAL GOODS AND SERVICES (SOUTH AFRICA)**

#### **THE APPLICATION OF CONTRACT PRICE ADJUSTMENT (CPA) TO TENDER SUBMISSIONS**

*This Section will not be applicable to professional services contract*

#### **1. APPLICATION OF CPA**

Eskom will afford Tenderers an opportunity to propose additional/alternate offers to the abovementioned. Additional Offers, which are optional, will only be considered if a fully compliant Main Offer is submitted and acceptable

CPA conditions may apply if the contractual duration is to be longer than 12 months. If the contractual duration will be less than or equal to 12 months, a fixed priced offer must be submitted.

#### **2. TENDER SUBMISSIONS**

Tenderers shall comply with the following requirements:

##### **a. Main offer:**

1. A Main Offer that is fully compliant with the CPA requirements as specified in the Enquiry.
2. This condition is mandatory unless a fully fixed priced offer is submitted. If more than one offer is submitted, then the fully CPA compliant offer must be indicated as the Main Offer.

**Failure to do so may result in the supplier's offer(s) being disqualified.**

##### **b. Additional/Alternative offer:**


Additional offers, which are optional, will only be considered if a fully compliant main offer is submitted and acceptable:

1. A fixed priced offer in addition to the fully CPA compliant main offer; or
2. Any other offer with CPA specifications which deviate from the CPA requirements specified in the enquiry. However, it is compulsory that all such deviations are sufficiently substantiated.

Additional/Alternative Offers must be clearly indicated as such

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### 3. ESKOM'S PREFERRED INDEX LIST

Eskom's preferred index list is set out hereunder in Tables 1 and 2. The index list comprises indices that could be used in the Tenderers main offer.

### 4. FOREIGN PORTION OF THE TENDER/AGREEMENT PRICE

In instances where the preferred index list does not specify a foreign index which is required for the specific agreement, the following must apply:

1. The source of an index must be that of the national statistical institute of the relevant country or a generally acknowledged statistical (e.g. industry) body in or for that country, e.g. BEAMA and MEPS.
2. The index must be the equivalent, or if unavailable, the nearest equivalent index to that of the specific prescribed local index.

### 3. NUMBER OF FORMULAE & INDICES

The Tenderer is limited to a maximum of 10 (ten) indices in total, i.e.: a maximum of 5 local indices and maximum of 5 foreign indices, excluding the fixed portion per CPA formula, per offer/agreement.

### 4. CPA FIXED PORTION

A minimum of 15% of the total agreement value is to be fixed when a CPA formula applies; except in the case of professional services or consulting agreements.

### 5. BASE DATE

1. In instances of indices or other references published monthly, the Base Date is to be:  
*The month before the month in which the Enquiry closes*
2. In instances where the reference figures, e.g. market prices, are published daily or at more intervals than once a month:  
*The average for the month before the month in which the Enquiry closes*
1. In this case, the following shall apply:
  1. Where the average is published:  
*The average published price in the currency Eskom will be exposed to. e.g. The currency in which Eskom will effect payment*
  2. Where a high, low and mean are published:  
*The mean*
  3. Where other prices than the Cash Settlement or Cash Sellers Price are published:

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*The Cash Settlement or Cash Sellers Price*

2. Where applicable, these principles, must also apply for the CPA “cut-off” date.

### 3. CPA FOR PROFESSIONAL SERVICES

The preferred index to be used for adjusting these agreements is the country specific CPI Headline index.

The price adjustment factor will be effective from each contractual anniversary of the base date. This must be the average of the country specific CPI Headline index figures published for the last twelve month period (cycle) ending before the contract anniversary date.

No fixed portion is mandatory.

Signed

Date

Name

Position


Tenderer

**Table 1: Preferred Local Index List** -this list of indices needs to be relevant to the commodity.  
Buyers need to check and include the relevant indices.

Labour	Commodities	Processed material	Transport	Others
<b>Labour general (hourly paid)</b> SEIFSA, C3, actual labour cost	<b>Steel</b> StatsSA, P0142.1 Table 2, basic iron and steel	<b>Mechanical engineering material</b> SEIFSA, G, mechanical engineering material	SEIFSA, L2, road freight costs	StasSA, PO141 <b>CPI</b> (Headline) all items OR SEIFSA, D-2 (CPI)
	<b>Copper</b> SEIFSA, F, copper metric ton	<b>Electrical engineering material</b> SEIFSA, G-1, electrical engineering material		
<b>Labour general</b> SEIFSA, C3 (a), actual labour cost (field force) where subsistence	<b>Aluminium</b> SEIFSA, R, aluminium	<b>Building and construction material</b>		StasSA, PO142.1), <b>PPI</b> 4. Final Manufactured Goods
	<b>Zinc</b> SEIFSA, F, zinc			

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allowance is paid	<b>Lead</b> SEIFSA ,F, lead	SEIFSA, G, building and construction material		5. Or Intermediate Manufactured Goods OR 6. SEIFSA Table U Producer Price Index (PPI)  - final manufactured GOODS OR Intermediate Manufactured Goods
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**Table 2: Preferred Foreign Index List**


Labour	Commodities	Processed material	Transport	Others
National Statistical Institute, Country-specific general labour index	MEPS, Country-specific general steel index	National Statistical Institute, Country-specific mechanical engineering material	National Statistical Institute, Country-specific general transport cost index	National Statistical Institute, Country-specific CPI (Headline)  National Statistical Institute, Country-specific PPI
	LME, Copper	National Statistical Institute, Country-specific electrical engineering material		
	LME, aluminium	National Statistical Institute, Country-specific building and construction material		
	LME, zinc			
	LME, lead			

Closing date of tender \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

TENDERER'S SIGNATURE \_\_\_\_\_

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## **ANNEXURE E**

### **CPA (IG) REQUIREMENTS FOR FOREIGN GOODS AND SERVICES**

#### **CONTRACT PRICE ADJUSTMENT AND FOREX PAYMENTS – IMPORTATION**

Failure to propose contract price adjustment methods, either by completing this document or proposing alternative methods for any portion of the tender price, will lead to that portion of the tender price being considered fixed.

Where space in this document is insufficient, the tenderer shall submit the required information on separate schedules, duly referenced to this document.

Where foreign exchange is involved, and Eskom will cover the risk forward, the methods of payment listed in Part 1 are the only acceptable methods. It must be noted that Eskom considers Payment **Method 1** to be the default payment method.

#### **PART 1: PAYMENT OF FOREIGN COMMITMENTS**

Payment of Eskom's foreign commitment in foreign currency will be made either:

##### **Payment Method 1A:**

To a nominated bank account in a foreign country in a foreign currency (payment will be made to the party and account nominated by the supplier in the contract, and not to any other party);

**Please note that the contracting party must be the direct importer of the goods**

**Applicable (Y / N)**

Payment Method 1B;

To a valid SARB approved CFC account in South Africa, in a foreign currency (payment will be made to the party and account nominated by the supplier in the contract, and not to any other party).

Please note:

1. The contracting party must be the direct importer
2. For payment purposes, Eskom will require both the foreign (commercial ) invoice and the local tax invoice
3. The foreign currency values on both the commercial and local invoice must be the same. Eskom will not pay any profit in foreign currency.
4. Service related payments are excluded from this option;


**Applicable(Y/N) or**

##### **Payment Method 2:**

In South African Rand at the selling spot rate of exchange obtained by Eskom's Treasury on the date that the forward cover is cancelled. Eskom will notify the supplier of the date that the forward cover is cancelled as well as the intended payment date, which will be as per the agreed payment terms. Any exchange rate adjustment after Eskom has notified the supplier of the date and the rate which the forward cover is cancelled, will be for the account of

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the supplier.

Please note:

1. The contracting party has to be the direct importer of the goods.
2. This payment option is not applicable for the payment of services

**Applicable (Y/N).....**

An indemnity in writing confirming that the supplier will not buy forward cover is required where Payment Method 1 or 2 is contracted.

***[Payment Method 2 must be accepted by the Commercial Policy and Procedure Manager before the tender documentation is sent out, but at the latest before the tender closing date. If it is not approved before tender closing, Payment Method 1 will be the default.]***

Fixed ZAR pricing

The tenderer may elect to be responsible for the hedging of the exposure of the imported content. However, Eskom reserves the right to have line of sight of the exchange rates to be quoted by the tenderer. This entails a simultaneous exercise of the verification of the exchange rates to be used.

**Applicable (Y/N).....**

Please note: Eskom will require substantiating proof of importation at the time of invoicing, if payment methods 1A,1B and 2 are selected.

Where goods were previously imported into stock by the supplier, for delivery to various customers, including Eskom, the price quoted must be in South African Rand. In such cases Eskom will not undertake any foreign exchange commitment or arrange forward cover.

## **PART 2: EXCHANGE RATES**

The tenderer shall use the exchange rate as at 12H00 on the date of the advertisement of the tender. The source of the exchange rates shall be the South African Reserve Bank ([www.resbank.co.za](http://www.resbank.co.za))

Please note that the tenderer is required to submit proof of the SARB rate/s used.

## **PART 3: ADJUSTMENT OF IMPORTATION COSTS, ETC**

The values in Rand included in the tender/contract price for the following costs shall be based on rates ruling for the month prior to the closing date of the tender and any variation in these rates applied to the value included in the tender price will be for Eskom's account.

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	RATES/TARIFFS
Sea/Air Freight	
Bunker Adjustment Factor	
Currency Adjustment Factor	
Marine Risk Insurance (MRI) (Eskom will provide cover)	
Rate for Extension of MRI after Arrival of Goods at Site (if required)	
Wharfage	
Landing Charges	
Customs Duties	
RSA Port on which Import Charges are Based	

#### **PART 4: ADJUSTMENT OF OVERSEAS MANUFACTURE, EXPATRIATE LABOUR AND OTHER COSTS** *(To be read in conjunction with Eskom CPA Index)*

Eskom requires a fixed portion (free of price adjustment) appropriate to the nature of the contract.

The methods/formulae proposed in this part shall clearly identify the base month, the period over which adjustment will apply, the elements of labour and materials and source of the indices/rates/prices to be used.

The source of indices/prices/rates nominated in this part shall be from a recognised publishing authority. It must be clearly and completely defined. Supplier in-house indices are not acceptable.

The value of overseas manufacture, labour and material costs (ex-works), inland transportation, expatriate labour, etc. included in the tender/contract price shall be subject to adjustment in accordance with the methods stated hereunder.

The base indices/prices/rates shall be those ruling for the month prior to the month of the closing of the enquiry.

##### **1. MANUFACTURING CPA METHOD (LABOUR AND MATERIAL)**


Please submit your proposals for this section on a separate sheet of paper as an annexure.

##### **2. EXPATRIATE LABOUR METHOD**

Please submit your proposals for this section on a separate sheet of paper as an annexure.

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3. OTHER VALUES METHOD (e.g. Engineering fees, design fees, barging, inland transportation, etc.)

Please submit your proposals for this section on a separate sheet of paper as an annexure.

#### **PART 5: ADJUSTMENT OF LOCAL MANUFACTURE/SUPPLY MATERIAL, TRANSPORT AND ERECTION COSTS**

The contract price adjustment method for local manufacture or partly local manufacture from imported stock, equipment or plant cost, transport cost within the RSA and local erection/installation cost shall be in accordance with the attached Eskom CPA Principles

#### **PART 6: GUIDELINES FOR CONTRACT PRICE ADJUSTMENT CLAIMS --- PART 2, 3 AND 4**

1. When the percentage increase or decrease between two indices/prices/tariffs is calculated, the earlier figure shall be taken as the base.
2. Where portions of the works are delivered at different times, contract price adjustments shall be made in respect of appropriate portions of the contract price.
3. Where the terms of payment of the contract allow progress payments, other than Eskom's standard payment terms, the agreed contract price adjustment method shall be applied to the value of such payment and to the date and level of completion to which payment is linked.
4. Where any figure given in a table is therein stated to be a provisional figure or is subsequently amended, the figure as ultimately confirmed or amended in the publication concerned shall apply.
5. Where the appropriate claim indices/prices, as defined in terms of the agreed formulae, are not available or are provisional, interim claims based on the last published confirmed or revised indices/prices as at the date of delivery/installation may be submitted. When the confirmed or revised index/price becomes available the final claim may be submitted, provided that such claim is received within 180 days of the date of delivery/installation.
6. Where requested by Eskom, the contractor shall submit publications showing base indices/prices/rates as they become available as well as updated values at three monthly intervals during the course of the contract.
7. Where it is considered necessary Eskom reserves the right to call for any documentary evidence to substantiate claims.

Closing date of tender \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

TENDERER'S SIGNATURE \_\_\_\_\_

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## **ANNEXURE F1**

SBD 6.2

### **DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS**

This Standard Bidding Document (SBD) must form part of all bids invited. It contains general information and serves as a declaration form for local content (local production and local content are used interchangeably).

Before completing this declaration, bidders must study the General Conditions, Definitions, Directives applicable in respect of Local Content as prescribed by the Dtic, the South African Bureau of Standards (SABS) approved technical specification number SATS 1286:2011 (Edition 1) and the Guidance on the Calculation of Local Content together with the Local Content Declaration Templates [Annex C (Local Content Declaration: Summary Schedule), D (Imported Content Declaration: Supporting Schedule to Annex C) and E (Local Content Declaration: Supporting Schedule to Annex C)].

#### **1. General Conditions**

1.1. Dtic makes provision for the promotion of local production and content.

1.2. Dtic prescribes that in the case of designated sectors, organs of state must advertise such tenders with the specific bidding condition that only locally produced or manufactured goods, with a stipulated minimum threshold for local production and content will be considered.

1.3. A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.

1.4. The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286: 2011 as follows:

$$LC = [1 - x / y] * 100$$

Where

x is the imported content in Rand

y is the bid price in Rand excluding value added tax (VAT)


Prices referred to in the determination of x must be converted to Rand (ZAR) by using the exchange rate published by South African Reserve Bank (SARB) at 12:00 on the date of advertisement of the bid as indicated in paragraph 4.1 below.

**The SABS approved technical specification number SATS 1286:2011 is accessible on [http://www.thedti.gov.za/industrial development/ip.jsp](http://www.thedti.gov.za/industrial%20development/ip.jsp) at no cost.**

1.5. A bid may be disqualified if this Declaration Certificate and the Annex C (Local Content Declaration: Summary Schedule) are not submitted at the stipulated deadlines.

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**2. The stipulated minimum threshold(s) for local production and content (refer to Annex A of SATS 1286:2011) for this bid is/are as follows:**

<u>Description of services, works or goods</u>	<u>Stipulated minimum threshold</u>
_____	_____ %
_____	_____ %
_____	_____ %

**3. Does any portion of the goods or services offered have any imported content?**

*(Tick applicable box)*

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

**3.1** If yes, the rate(s) of exchange to be used in this bid to calculate the local content as prescribed in paragraph 1.5 of the general conditions must be the rate(s) published by SARB for the specific currency at 12:00 on the date of advertisement of the bid.

The relevant rates of exchange information is accessible on [www.reservebank.co.za](http://www.reservebank.co.za)

Indicate the rate(s) of exchange against the appropriate currency in the table below (refer to Annex A of SATS 1286:2011):


<b>Currency</b>	<b>Rates of exchange</b>
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

**NB:** Bidders must submit proof of the SARB rate (s) of exchange used.

**4.** Where, after the award of a bid, challenges are experienced in meeting the stipulated minimum threshold for local content the dtic must be informed accordingly in order for the DTIC to verify and in consultation with the AO/AA provide directives in this regard.

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**LOCAL CONTENT DECLARATION**  
**(REFER TO ANNEX B OF SATS 1286:2011)**

**LOCAL CONTENT DECLARATION BY CHIEF FINANCIAL OFFICER OR OTHER LEGALLY RESPONSIBLE PERSON NOMINATED IN WRITING BY THE CHIEF EXECUTIVE OR SENIOR MEMBER/PERSON WITH MANAGEMENT RESPONSIBILITY (CLOSE CORPORATION, PARTNERSHIP OR INDIVIDUAL)**

**IN RESPECT OF BID NO. ....**

**ISSUED BY:** (Procurement Authority / Name of Institution):

.....  
**NB**

- 1 The obligation to complete, duly sign and submit this declaration cannot be transferred to an external authorized representative, auditor or any other third party acting on behalf of the bidder.
- 2 Guidance on the Calculation of Local Content is accessible on <http://www.thdti.gov.za/industrial development/ip.jsp>.
- 3 Local Content Declaration Templates (Annex C, D and E) is attached to this enquiry and must be submitted at the stipulated deadline.
- 4 Bidders should first complete Declaration D. After completing Declaration D, bidders should complete Declaration E and then consolidate the information on Declaration C. **Declaration C should be submitted at the stipulated deadline of the bid in order to substantiate the declaration made in paragraph (c) below.** Declarations D and E should be kept by the bidders for verification purposes for a period of at least 5 years. The successful bidder is required to continuously update Declarations C, D and E with the actual values for the duration of the contract.


I, the undersigned, ..... (full names),  
do hereby declare, in my capacity as .....  
of .....(name of bidder entity), the following:

- (a) The facts contained herein are within my own personal knowledge.
- (b) I have satisfied myself that:
  - (i) the goods/services/works to be delivered in terms of the above-specified bid comply with the minimum local content requirements as specified in the bid, and as measured in terms of SATS 1286:2011; and
  - (c) The local content percentage (%) indicated below has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E which has been consolidated in Declaration C:

Bid price, excluding VAT (y)	R
------------------------------	---

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Imported content (x), as calculated in terms of SATS 1286:2011	R
Stipulated minimum threshold for local content (paragraph 3 above)	
Local content %, as calculated in terms of SATS 1286:2011	

**If the bid is for more than one product, the local content percentages for each product contained in Declaration C shall be used instead of the table above.**

**The local content percentages for each product has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E.**

(d) I accept that the Procurement Authority / Institution has the right to request that the local content be verified in terms of the requirements of SATS 1286:2011.

(e) I understand that the awarding of the bid is dependent on the accuracy of the information furnished in this application. I also understand that the submission of incorrect data, or data that are not verifiable as described in SATS 1286:2011, may result in the Procurement Authority / Institution imposing any or all of the remedies as provided for in Regulation 9.1 of the Preferential Procurement Regulations, 2022 promulgated under the Preferential Policy Framework Act (PPPFA), 2000 (Act No. 5 of 2000).

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**WITNESS No. 1** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**WITNESS No. 2** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**Annexure F2- \_Local content Declaration-Summary Schedule (annex C)**



Adobe Acrobat Document

**Annexure F3 - \_Imports Declaration-Supporting schedule to Annex C(annex D)**



Adobe Acrobat Document


**Annexure F4 - \_Local Content Declaration-Supporting Schedule to Annex C (annex E)**



Adobe Acrobat Document

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## ANNEXURE G

**SBD 1**

### PART A INVITATION TO BID

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>					
BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					
<b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
	TCS PIN:		<b>OR</b>	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes <input type="checkbox"/> No	
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
	<input type="checkbox"/>	A REGISTERED AUDITOR			
		NAME:			
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs&amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>					

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ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ANSWER PART B:3 BELOW ]
SIGNATURE OF BIDDER	.....	DATE	
CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)			
TOTAL NUMBER OF ITEMS OFFERED		TOTAL BID PRICE (ALL INCLUSIVE)	
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>		<b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>	
DEPARTMENT/ PUBLIC ENTITY		CONTACT PERSON	
CONTACT PERSON		TELEPHONE NUMBER	
TELEPHONE NUMBER		FACSIMILE NUMBER	
FACSIMILE NUMBER		E-MAIL ADDRESS	
E-MAIL ADDRESS			

## PART B TERMS AND CONDITIONS FOR BIDDING

<b>BID SUBMISSION:</b>
1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.  2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR ONLINE  3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.  4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.  5. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
<b>TAX COMPLIANCE REQUIREMENTS</b>
1. BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.  2. BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.  3. APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.  4. BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.  5. IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE

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PROOF OF TCS / PIN / CSD NUMBER.

6. WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.

#### QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS


1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO
2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO
3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO
4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO

IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

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## ANNEXURE H

## SBD 6.1

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

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

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

#### 1. GENERAL CONDITIONS

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

#### 1. To be completed by the organ of state

*(delete whichever is not applicable for this tender).*

1. The applicable preference point system for this tender is the **90/10** preference point system.
2. The applicable preference point system for this tender is the **80/20** preference point system.
3. Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1. Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
  1. Price; and
  2. Specific Goals.


#### 1. To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	

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<b>SPECIFIC GOALS</b>	
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

2. Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
3. The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

### 3. DEFINITIONS

1. **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
2. **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
3. **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
4. **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
5. **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

### 6. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

#### 1. POINTS AWARDED FOR PRICE

##### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS


A maximum of 80 or 90 points is allocated for price on the following basis:

$$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right) \text{ or } P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Where

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Ps = Points scored for price of tender under consideration  
 Pt = Price of tender under consideration  
 Pmin = Price of lowest acceptable tender

## 2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

### 1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

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

Where

Ps = Points scored for price of tender under consideration  
 Pt = Price of tender under consideration  
 Pmax = Price of highest acceptable tender

### 7. POINTS AWARDED FOR SPECIFIC GOALS

1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
  1. an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  2. any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the

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90/10 and 80/20 preference point system.

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

*(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.*

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


The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)

#### DECLARATION WITH REGARD TO COMPANY/FIRM

- Name of company/firm.....
- Company registration number: .....
- TYPE OF COMPANY/ FIRM
  - ☐ Partnership/Joint Venture / Consortium
  - ☐ One-person business/sole propriety
  - ☐ Close corporation
  - ☐ Public Company
  - ☐ Personal Liability Company
  - ☐ (Pty) Limited

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- ☐ Non-Profit Company  
☐ State Owned Company  
 [TICK APPLICABLE BOX]

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

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

.....

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

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


**DATE:** .....

**ADDRESS:** .....

.....

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	<b>Invitation to Tender/ Request for Proposal (RFP)</b>	<b>Document Identifier</b>	240-114238630	<b>Rev</b>	16
		<b>Effective Date</b>	15 February 2023		
		<b>Review Date</b>	February 2028		

## Annexure I

## SBD 4

### BIDDER'S DISCLOSURE

#### 1. PURPOSE OF THE FORM

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

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

#### 2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest<sup>1</sup> in the enterprise,

employed by the state?

**YES/NO**

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

Full Name	Identity Number	Name of State Institution

<sup>1</sup> the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

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

2.2.1 If so, furnish particulars:

.....  
.....

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

1. If so, furnish particulars:

.....  
.....

### 3. DECLARATION

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

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

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.

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

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


3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and

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<sup>2</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

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

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

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

.....	.....
Signature	Date
.....	.....
Position	Name of bidder

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