

	Invitation to Tender	Document Identifier	240-114238630	Rev	12
		Effective Date	28 October 2022		
		Review Date	October 2027		

**ESKOM HOLDINGS SOC LTD.**

**INVITATION TO TENDER**

**FOR**

**PROVISION OF MANUFACTURING, SUPPLY AND DELIVERY OF SMART METERS  
WITHIN GAUTENG CLUSTER FOR A PERIOD OF 36 MONTHS, ON AN “AS AND  
WHEN” REQUIRED BASIS**

<b>Tender number</b>	<b>MWP1763DX</b>
<b>Issue date</b>	<b>15 December 2022</b>
<b>Closing date and time</b>	<b>27 February 2023 at 10h00 SAST (GMT+2)</b>
<b>Tender validity period</b>	<b>120 days from the closing date and time</b>
<b>Non-compulsory Clarification meeting</b>	<p><b>Date: 30 January 2023</b>  <b>Venue: Microsoft Teams or via e-mail</b>  <b>Time: 10h00 SAST (GMT+2)</b></p> <p>(Meeting Link: <a href="#">Click here to join the meeting</a>)</p> <p>The clarification meeting is not compulsory; it is for information-sharing. Make sure that you have Microsoft Teams so that you can be able to connect. You can use this link to <a href="https://www.microsoft.com/en-za/microsoft-teams/download-app">https://www.microsoft.com/en-za/microsoft-teams/download-app</a> to download Microsoft Teams.</p>
<b>Tenders are to be delivered to the following address on the stipulated closing date and time:</b>	<p><b>The Tender Office</b>  <b>Megawatt Park Tender Office - Northside</b>  <b>No. 01 Maxwell Drive</b>  <b>Sunninghill</b>  <b>Gauteng</b></p>

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## Invitation to Tender

Eskom Holdings SOC Ltd (hereinafter “Eskom”) invites you to submit a *tender* for the **Provision of Manufacturing, Supply and Delivery of Smart Meters within Gauteng Cluster for a period of 36 months, on an “as and when” required basis.**

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 by you in response to this *Invitation* 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 documents may be addressed to the Eskom *Representative*.

Yours faithfully




Thulani Mdakane  
Procurement Manager  
Distribution Gauteng Cluster

Date: 15/12/2022

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1.1 The following documents listed hereunder are attached to this enquiry:

Number	Description	Annexures attached	Attached (Y/ N/ N/A)
1.1.1	*Acknowledgement Form	Annexure A	Y (Page 18)
1.1.2	*Tenderer's Particulars	Annexure B	Y (Page 20)
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 (Page 24)
1.1.4	*CPA Requirements for Local Goods/Services	Annexure D	Y (Page 29)
1.1.5	*CPA(IG) for Foreign Goods/Services (if applicable)	Annexure E	Y (Page 31)
1.1.6	SBD 6.2 – Declaration Certificate for Local Production and Local Content (only applicable if designated materials are included).	Annexure F1	Y (Page 37)
	Annexure C – Local Content Declaration – Summary Schedule	Annexure F2	Y (Separately)
	Annexure D – Imported Content Declaration – Supporting Schedule to Annexure C	Annexure F3	Y (Separately)
	Annexure E – Local Content Declaration – Supporting Schedule to Annexure C	Annexure F4	Y (Separately)
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 (Page 40)
1.1.8	*SBD 6.1 – Preference Points Claim Form in terms of PPPFA 2017 regulations	Annexure H	Y (Page 42)
1.1.9	*SBD 4 – Bidders Disclosure	Annexure I	Y (Page 49)
1.1.10	Technical / Functionality Requirements	Annexure J	Y (Separately)
1.1.11	NEC3 Supply Contract (SC)	Annexure K	Y (Separately)
1.1.12	Supplier Development & Localisation (SDL&I) Undertaking	Annexure L	Y (Separately)
1.1.13	Quality Requirements	Annexure M	Y (Separately)
1.1.14	Requirements for Financial Statements Analysis	Annexure N	Y (Separately)

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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**; 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 (2) documents.

Clause Number from Standard Conditions of Tender	Tender Data
1.1 Parties	<p>The <i>Employer</i> is <b>Eskom Holdings SOC Ltd.</b></p> <p>The Eskom <i>Representative</i> is:  Name: <b>Didi Motsemme</b>  Tel: <b>011 800 5081</b>  E-mail: <a href="mailto:MotsemD@eskom.co.za">MotsemD@eskom.co.za</a></p>
1.3 Enquiry documents	<p>The Invitation to tender number is: <b>MWP1763DX</b></p> <p>See the content list above for the enquiry documents.</p>
1.4 Type of Invitation to Tender	This invitation to tender is: <b>An open Invitation to tender</b>
1.6 Eskom's rights to accept or reject any tender	<p>The tender shall be for the whole/parts of the contract.</p> <p><b>The plan is to award the contract to a minimum of one (1) supplier and maximum of two (2) suppliers depending on the outcome of the evaluations and highest scoring supplier in accordance with PPPFA ranking. However, should one (1) supplier qualify, Eskom will re-assess the achieved number at the time and make a determination whether to top-up or not to top-up.</b></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</b> if:</p> <ul style="list-style-type: none"> <li>- 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</li> </ul>

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	<p>subcontractors or suppliers for any part of the Contract including related services.</p> <ul style="list-style-type: none"> <li>- Tenderers submit more than one (1) tender either individually or as a partner in a joint venture (JV) or consortium.</li> <li>- Tenders 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>- 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 process, if: <ul style="list-style-type: none"> <li>(a) they have a controlling partner/majority shareholder in common; or</li> <li>(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 of another Tenderer or influence the decisions of the Employer regarding this bidding process.</li> </ul> </li> <li>- Tenders signed by non-authorized persons.</li> <li>- Where the tenderers are not registered on National Treasury's Central Supplier Database (except Foreign Suppliers).</li> <li>- A tender that fails to meet any pre-qualifying criteria stipulated in the tender documents is an unacceptable tender (Section 4(2) of PPPFA Regulations).</li> <li>- Any tenderer that is restricted by National Treasury.</li> <li>- A tenderer that sub-contracts 100% Scope of Work.</li> </ul> <p><b>Ineligible tenderers will be disqualified.</b></p>
2.2 -2.5 Tender Closing	<p>The deadline for <b><i>Tender</i></b> submission is:</p> <p>Tender No.: <b>MWP1763DX</b>  Date: <b>27 February 2023</b>  Time: <b>10h00 SAST (GMT+2)</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:</p> <p><b>THE TENDER OFFICE</b>  <b>Megawatt Park Tender Office - Northside</b></p>

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	<b>No. 01 Maxwell Drive Sunninghill Gauteng</b>
2.9 Copy of original tender	<p>The tenderer must submit the tender as a complete original tender, plus one (1) exact <b>hard copy</b> of the original tender at tender submission deadline. Eskom also prefers that one (1) additional complete soft copy (in USB) of the original tender be submitted.</p> <p>Where a Tenderer does not submit one (1) exact hard copy of the original tender at tender submission deadline, the tenderer will be disqualified. The tenderer will not be permitted to provide the required copies after the deadline for tender submission have passed and the soft copy will not be replacing the hard copy.</p> <p><b>Note:</b> Tender evaluations will be based on the copy submitted. Therefore, it is the Tenderer's responsibility to ensure that the copy is exactly identical to the original and Eskom will not accept any liability if it conducts evaluations on an incomplete copy submitted by the Tenderer.</p>
2.13 Tender Validity Period	<p>The tender validity period is <b>16 weeks (120 days)</b>.</p>
2.16 Clarification meetings	<p>A <b><i>non-compulsory clarification meeting</i></b> with representatives of the <i>Employer</i> will take place as follows:</p> <p>Date: <b>30 January 2023</b>  Time: <b>10h00 SAST (GMT+2)</b>  Venue: <b>Microsoft Teams</b>  Meeting Link: <a href="#">Click here to join the meeting</a></p> <p><i>Tenderers</i> must confirm their intention to attend with the Eskom <i>Representative</i> stating the name, position and contact details of each proposed attendee.</p> <p><b>The clarification meeting is not compulsory; it is for information sharing. Make sure that you have Microsoft Teams so that you can be able to connect. You can use this link to <a href="https://www.microsoft.com/en-za/microsoft-teams/download-app">https://www.microsoft.com/en-za/microsoft-teams/download-app</a> to download Microsoft Teams.</b></p> <p><i>Tenderers</i> must confirm their intention to attend with the Eskom <i>Representative</i> stating the name, position and contact details of each proposed attendee.</p>

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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, on <b>13 February 2023</b> at <b>10h00</b> which is <b>ten (10)</b> working days before the deadline for tender submission.
2.23 Alternative tenders	Alternative tenders are <b><i>not allowed</i></b> .
2.25 Conditions of contract	The conditions of contract will be the <b>NEC3 Supply Contract (SC)</b> .
2.31 Provision of security for performance	<p>Due diligence will be done through a review of financial viability and should the tenderer be found financially not viable, security for performance will required as risk mitigating factors. The names of two (2) financial institutions that the tenderer will approach must be submitted during the review of financial viability.</p> <p>The following bonds will be required for this enquiry as part of the risk mitigating:</p> <ol style="list-style-type: none"> <li>1. Parent Company Guarantee (PCG) by the holding company; or</li> <li>2. Performance Bond from their bank - Please note that the PCG and the Performance Bond should be on an Eskom Legal approved template.</li> <li>3. If it happens that the entity does not have a holding company and/or the bank cannot provide the Performance Bond, the owners of the entity should provide their tax returns for the past five (5) years plus personal financial position.</li> </ol> <p>If the risks cannot be mitigated to ensure performance against the contract, the contract may be awarded to another supplier, which may not be the highest ranked supplier if offering market-related prices.</p>
3.4 Opening of tenders	Tenders will be opened at the same date and time as the tender deadline.
3.5 Prices to be read out	Prices will <b><i>not be read out</i></b> .
3.9 Basic Compliance	<p>Basic compliance for this invitation to tender are:</p> <ul style="list-style-type: none"> <li>- Meet the eligibility criteria for a tenderer.</li> <li>- Submit one (1) hard copy of the original tender to Eskom.</li> <li>- Submit a complete original tender with commercial, financial and technical information (preference is to submit separate the files).</li> <li>- Submission of the mandatory commercial tender returnables as at stipulated deadlines.</li> <li>- Central Supplier Database (CSD) number (MAAA.....).</li> </ul>

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3.10 Mandatory tender returnables	A tenderer that does not submit mandatory documents/information in 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.
3.11 Pre-qualification criteria	<p>Pre-qualification criteria <b>are applicable</b>.</p> <p>The following mandatory pre-qualification criteria are applicable herein:</p> <ul style="list-style-type: none"> <li>• B-BBEE EME – LME Level 1 – 4;</li> <li>• a tenderer to subcontract to one or more of the following designated groups: <ul style="list-style-type: none"> <li>(i) an EME or QSE which is at least 51% owned by black people who are youth;</li> <li>(ii) an EME or QSE which is at least 51% owned by black people who are women;</li> <li>(iii) an EME or QSE which is at least 51% owned by black people with disabilities;</li> <li>(iv) an EME or QSE which is 51% owned by black people living in rural or underdeveloped areas or townships;</li> <li>(v) a cooperative which is at least 51% owned by black people.</li> </ul> </li> </ul> <p>Where B-BBEE levels, EME – LME status or sub-contracting to designated groups is used as pre-qualification criteria; then tenderers are required to provide “<b>proof of B-BBEE status level of contributor</b>” at tender submission deadline.</p> <p>May include the following:</p> <ul style="list-style-type: none"> <li>- signed sub-contracting intent agreement / signed sub-contracting agreement between the main contractor and sub-contractor,</li> <li>- original or certified copy of B-BBEE certificate or original signed sworn affidavit,</li> <li>- company registration documents for all sub-contractors,</li> <li>- confirmation that the sub-contractor is registered on CSD, medical certificate in the event of BPwD entity being proposed as a subcontractor,</li> <li>- proof of address in the event that the subcontracted entity is at least 51% owned by black people from rural or underdeveloped areas or townships,</li> <li>- share certificates in the event that the subcontracted entity is a company or a Co-operative,</li> </ul>

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	<p>- ID copy of the owner in the event that the subcontracted entity is at least 51% black youth owned.</p> <p>If the relevant documentation/information as stipulated in the enquiry is not submitted; said tenders will be disqualified.</p>								
3.12 Designated materials and thresholds	<p>Designated material thresholds <b>are applicable</b>.</p> <p>The following materials are identified as designated materials and the threshold thereof that the tenderers must meet in order to be evaluated further are tabulated as follow:</p> <table border="1"> <thead> <tr> <th>Description of services, works or goods</th><th>Stipulated threshold %</th></tr> </thead> <tbody> <tr> <td>SMART Meters</td><td>50%</td></tr> <tr> <td>Prepaid Electricity Meters</td><td>70%</td></tr> <tr> <td>Post-paid Electricity Meters</td><td>70%</td></tr> </tbody> </table> <p>Tenderers need to complete and submit <b>Annexure F1</b> on <b>Page 37</b> and <b>Annexure F2 – F4</b> attached separately, hereto as evidence of compliance with this requirement.</p> <p><b>NOTE:</b> The following documents should also be completed and signed:</p> <ul style="list-style-type: none"> <li>• A completed and duly signed SBD 6.2 – Local Content Declaration Certificate.</li> <li>• A completed and duly signed Annexure C, D and E.</li> <li>• Completed and duly signed Preference Point Claim Form.</li> </ul> <p><b>NOTE:</b> <b>When the above cannot be wholly sourced from South Africa (SA) based manufactures to achieve the designated local content threshold at any particular time, bidders should request and obtain written exemption from the dtic. Such exemption application should be submitted, and approvals should be obtained prior to the closure of the bid.</b></p> <p>The dtic has appointed SABS as the official verification agency for local content in terms of designated products.</p> <p><b>A tender that fails to meet the minimum stipulated threshold for local production and content will be disqualified.</b></p>	Description of services, works or goods	Stipulated threshold %	SMART Meters	50%	Prepaid Electricity Meters	70%	Post-paid Electricity Meters	70%
Description of services, works or goods	Stipulated threshold %								
SMART Meters	50%								
Prepaid Electricity Meters	70%								
Post-paid Electricity Meters	70%								

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3.13 Functionality requirements	<p>Functionality requirements <b><i>are applicable</i></b>.</p> <p>Functionality per required item will be evaluated as outlined in the attached standard named - <b>Technical Evaluation Criteria for a Smart Prepayment Systems</b>, Unique Identifier: <b>240-97225295</b>. Refer to <b>Annexure J</b> attached separately.</p> <p><b>Technical Tender Returnables</b></p> <p>Tenderers shall supply the following information:</p> <ol style="list-style-type: none"> <li>1) Declaration of Category under which the supplier will be tendering.</li> <li>2) Declaration of compliance to the gatekeepers in the Excel file for each item and category.</li> <li>3) Excel files (Schedule A &amp; B) must be returned to Eskom in Excel format (electronic) and in addition, converted to Acrobat for auditing purposes.</li> <li>4) Completed general questionnaire as listed in the Excel file.</li> <li>5) Completed technical schedules for all items tendered as listed in the Excel file.</li> <li>6) Completed risk and support questionnaire as listed in the Excel file. Suppliers are to complete a separate risk and support questionnaire sheet for each item/product being offered.</li> <li>7) Details regarding the make and model numbers of all items offered and auxiliary components.</li> <li>8) Data sheets, brochures and detailed product manuals for all components offered.</li> <li>9) Category 1 bidders must provide a list of DLMS/COSEM objects (or object model) implemented in their existing products or those under development.</li> </ol> <p><b>Evaluations</b></p> <p>The overall technical scoring shall be made up of scoring in the various sub-categories during the different phases of the technical evaluation as follows:</p>
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	<b>Functionality Criteria</b>	<b>Weighting</b>
	A&B Schedules as well as Risk and Support (Supply and Development Phase)	50%
	Functional evaluation with System Demonstration (Supply and Development Phase)	50%
	<b>Total</b>	<b>100%</b>
	Minimum threshold for qualification	85%
<p><b>Note:</b> For full Functionality / Technical Evaluation Scoring, refer to <b>Annexure J</b> attached separately.</p> <p>During the supply and development phase, suppliers will be required to provide Eskom with samples of their meters and data concentrators for the purpose of DLMS/COSEM compliance using the LMS/COSEM test suit. The results of the testing will be made available to the suppliers to aid with the development of products.</p> <p>Tenderers who do not meet the threshold for functionality scoring will be disqualified and not be evaluated further.</p>		
3.15 Evaluation of price	<p>Prices 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> <li>- Excluding contingencies in any bill of quantities or activity schedule.</li> <li>- Making an appropriate adjustment for any other acceptable variations, deviations, or alternative tenders submitted.</li> <li>- Making a comparison of the Net Present Value of each adjusted tender based on the tendered programme (if provided) and prices, on the estimated effect of Price Adjustment Factors and rate of exchange fluctuations (if applicable) and on other evaluation parameters relating to uncertainty and risk, where applicable.</li> <li>- Unconditional discounts must be taken into account for evaluation purposes;</li> <li>- Conditional discounts must not be taken into account for evaluation purposes but should be implemented when payment is effected.</li> </ul> <p>Prices will be scored out of 90 points.</p>	
3.17 Evaluation of B-BBEE	B-BBEE status will be scored out of 10 points in accordance with PPPFA.	

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	<p>If a tenderer fails to submit proof of B-BBEE status level, the tenderer will not be disqualified (except if B-BBEE level is a pre-qualification criterion). The tenderer will, however, be awarded 90 points for price and will score 0 points for B-BBEE level / status (out of 10).</p>
3.18 Ranking of tenders	<p>Suppliers will be ranked by applying the preferential point scoring based on the relevant system as stipulated hereunder:</p> <ul style="list-style-type: none"> <li>• <b>90/10 (for estimated values above R50M inclusive of VAT).</b></li> </ul> <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)	<p>Objective criteria <b>are not applicable</b>.</p>
3.20 Reverse e-auction (if applicable)	<p>Reverse e-auction <b>is not applicable</b>.</p> <p><b>Please note:</b></p> <ul style="list-style-type: none"> <li>• <b>The Tenderers will be required to submit a complete tender with prices.</b></li> </ul>
Contractual Requirements	<p>Contractual Requirements include the following:</p> <ul style="list-style-type: none"> <li>• <b>Supplier Development, Localisation and Industrialisation (SDL&amp;I) Undertaking</b> – Tenderer is advised to complete and submit the undertaking as required, and if they do not meet Eskom's targets, will not be disqualified. Eskom reserves the right to negotiate with the tenderer and the outcome of such negotiations will become a contractual obligation if it is awarded the contract. Refer to <b>Annexure L</b> attached separately.</li> <li>• <b>Quality Requirements:</b> Refer to <b>Annexure M</b> attached separately.</li> <li>• <b>Financial Statement Analysis:</b> Refer to <b>Annexure N</b> attached separately and to 2.31 above for further information.</li> </ul> <p><b>Please Note:</b></p> <ul style="list-style-type: none"> <li>- <b>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.</b></li> <li>- <b>Failure to meet "Contractual Requirements "by the stipulated deadlines; may result in the tenderer being regarded as non-responsive and ineligible for contract award.</b></li> </ul>

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	- 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.
CIDB Requirements (where applicable for Engineering and Construction Works Contracts)	CIDB Requirements <i>are not applicable</i> .

**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**
- (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.**

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### 1.3 TENDER RETURNABLES

The tenderer must submit the returnables set out hereunder as part of its tender. Returnables that are mandatory for evaluation will result in disqualification if not submitted at tender closing:

Reference	Returnables from supplier	Returnables mandatory for evaluation purposes and due at tender closing	Returnables mandatory for contract award and due prior to contract award
<b>Basic Compliance</b>	The tenderer must submit the tender as a complete original tender, plus one (1) exact <b>hard copy</b> of the original tender at tender submission deadline. Eskom may also require that one (1) additional complete soft copy (in USB) of the original tender is required in electronic format.	✓	
<b>Pre-qualification criteria:</b>  <b>B-BBEE Levels / EME – LME / Sub-contracting to Designated Groups</b>  <u>Please note that:</u> “proof of B-BBEE status level of contributor” means: (a) the B-BBEE status level certificate issued by an authorised body or person; or (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;	<b>“Proof of B-BBEE Status Level of Contributor”</b> for Main Contractor	✓	
	CSD Number	✓	
	Signed Sub-contracting Intent Agreement / Sub-contracting Agreement	✓	
	<b>“Proof of B- BBEE status level of contributor”</b> for Sub-contractor belonging to Designated Group	✓	
	Any other supporting documents to verify the status of the main contractor or sub-contractor (as may be stipulated in 3.11)	✓	

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<b>“Proof of B-BBEE status level of contributor” is required for pre-qualification purposes in terms of PPPFA regulations, and if it is not submitted by tender submission deadline or deemed invalid; the respective tenderer will be disqualified.</b>			
<b>Annexure A</b>	Acknowledgement Form	✓	
<b>Annexure B</b>	Tenderer's Particulars	✓	
<b>Annexure C</b>	Integrity Pact Declaration Form	✓	
<b>Annexure D</b>	CPA for Local Goods/Services (if applicable)	✓	
<b>Annexure E</b>	CPA(IG) for Imported Goods/Services (if applicable)	✓	
<b>Annexure F1 – F4</b>	SBD 6.2 – Declaration Certificate for Local Production and Content, and Annexures C, D, E	✓	
<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 2017 Regulations	✓	
<b>Annexure I</b>	SBD 4 – Bidders Disclosure	✓	
<b>Annexure L</b>	Supplier Development, Industrialisation & Localisation (SDL&I) Undertaking		✓
<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	✓	
	<b>“proof of B-BBEE status level of contributor” means:</b>	✓	

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	<p>(a) the B-BBEE status level certificate issued by an authorised body or person; or</p> <p>(b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or</p> <p>(c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act;</p> <p>(as may be applicable for the particular tendering entity)</p>		
	<p>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</p>		✓
<p><b>*“proof of B-BBEE status level of contributor” means:</b></p> <p>(a) the B-BBEE status level certificate issued by an authorised body or person; or</p> <p>(b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or</p> <p>(c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act;</p>	<p>Failure on the part of the supplier to submit <b>“proof of B-BBEE status level of contributor”</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 and it is not a pre-qualification criterion). The tenderer will, however, be scored zero (0) on B-BBEE for purposes of PPPFA scoring and ranking.</p>	✓	
<p><b>Tax Clearance Certificate</b></p>	<p>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).</p> <p>Foreign suppliers with no footprint in South Africa, must still complete the SBD 1 document, however no proof of Tax Compliance is required.</p>		✓

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<b>NEC3 Documentation</b>	Completed NEC3 Supply Contract Pricing Schedule and Contract Data. Refer to <b>Annexure K</b> attached separately.	✓	
<b>DOCUMENTS REQUIRED UNDER CONTRACT REQUIREMENTS</b>			
<b>Quality</b>	Documents that may be required per scope of work. Refer to <b>Annexure M</b> attached separately.		✓
<b>Due Diligence – Annexure N</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 (JV) 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/TECHINICAL CRITERIA</b>			
Technical (required for functionality scoring)	Refer to <b>Annexure J</b> attached separately.	✓	

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## **ANNEXURE A**

### **ACKNOWLEDGEMENT FORM**

We are in receipt of the Invitation to Tender 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 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]:**

- We agree to provide the cataloguing information as described in the *tender submission*. ☐

---



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- 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. ☐

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Invitation to Tender No: \_\_\_\_\_

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)	

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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	
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. Alternatively, you may contact **Eskom's Vendor Management department, to assist you further with the registration on CSD.**
6. If you are registered on SARS e-filing system, please provide your PIN number in order to verify your Tax Compliant Status. \_\_\_\_\_

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7. 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 e-filing 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 compete 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?

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:

- Black people
- Black people who are youth
- Black people who are women
- Black people with disabilities
- Black people living in rural or underdeveloped areas or townships
- Cooperatives which are 51% owned by Black people

If Eskom decides to apply the sub-contracting provision as specified in Regulation 4(c) all tenders above the prescribed maximum threshold for quotations must be advertised through an open competitive bidding process subject to potential tenderers meeting the subcontracting requirement to EMEs or QSEs that are 51% owned by the following enterprises:

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	
-----	--	----	--

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#### A. 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: \_\_\_\_\_

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

#### B. 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.

Legal Name of Joint Venture Member	Full Name and Capacity of Authorised Signatory	Signature

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## **ANNEXURE C**

### **INTEGRITY DECLARATION FORM**

***Note: This form must be fully completed, signed by supplier/tenderer and submitted as a mandatory returnable to the Invitation to Tender at tender closing. Failure to fully complete the form and/or submit relevant supporting documents and/or sign will result in the tender not being evaluated further.***

### **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:
  - a. an individual is related to another individual if they are married, or live together in a relationship similar to marriage;
  - b. or are separated by no more than two degrees of natural or adopted consanguinity or affinity;
  - c. 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

**a juristic person is “related” to another juristic person if:**

  - i. 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));
  - ii. either is a subsidiary of the other; or
  - iii. a person directly/indirectly controls each of them, or the business of each of them, as determined in accordance with the definition of “control”.

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5. the *tenderer/s* and one or more of the *tenderers* in this tendering 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 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.

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

- 2 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.

\_\_\_\_\_

- 3 Do the tenderer/s and other tenderer in this tendering 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** will be disqualified if the *tenderer/s*, or any of its directors have:

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

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Please complete the declaration with an “X” under YES or NO

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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#### 4 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

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 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

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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 may be 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).

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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:**

- A Main Offer that is fully compliant with the CPA requirements as specified in the Enquiry.
- 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:

- A fixed priced offer in addition to the fully CPA compliant main offer; or
- 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:

- 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.
- The index must be the equivalent, or if unavailable, the nearest equivalent index to that of the specific prescribed local index.

### 5. 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.

### 6. 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.

### 7. BASE DATE

- 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*
- 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.*
- In this case, the following shall apply:
  - 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.*
  - Where a high, low and mean are published:  
*The mean*
  - Where other prices than the Cash Settlement or Cash Sellers Price are published:  
*The Cash Settlement or Cash Sellers Price*
  - Where applicable, these principles, must also apply for the CPA "cut-off" date.

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## 8. 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.

to check and increase 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		StasSA, PO142.1, <b>PPI</b> <ul style="list-style-type: none"><li>Final Manufactured Goods OR<ul style="list-style-type: none"><li>Intermediate Manufactured Goods OR</li></ul></li><li>SEIFSA Table U Producer Price Index (PPI - Final Manufactured Goods OR<ul style="list-style-type: none"><li>Intermediate Manufactured Goods)</li></ul></li></ul>
<b>Labour general</b> SEIFSA, C3 (a), actual labour cost (field force) where subsistence allowance is paid	<b>Aluminium</b> SEIFSA, R, aluminium	<b>Building and construction material</b> SEIFSA, G, building and construction material		
	<b>Zinc</b> SEIFSA, F, zinc			
	<b>Lead</b> SEIFSA, F, lead			

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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:

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

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

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## 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 the supplier.

Please note:

- The contracting party has to be the direct importer of the goods.
- 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.

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### 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.

	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.

#### 4.1 MANUFACTURING CPA METHOD (LABOUR AND MATERIAL)

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

#### 4.2 EXPATRIATE LABOUR METHOD

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

#### 4.3 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.

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## **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 in the Preferential Procurement Regulations, 2017, 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 Preferential Procurement Regulations, 2017 (Regulation 8) make provision for the promotion of local production and content.
- 1.2 Regulation 8 (2) 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 Where necessary, for tenders referred to in paragraph 1.2 above, a two-stage bidding process may be followed, where the first stage involves a minimum threshold for local production and content and the second stage price and B-BBEE.
- 1.4 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.
- 1.5 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)

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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.thedtic.gov.za/sectors-and-services-2/industrial-development/> at no cost.

1.6 A bid may be disqualified if this Declaration Certificate and the Annex C (Local Content Declaration: Summary Schedule) are not submitted as part of the bid documentation.

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:

Description of services, works or goods	Stipulated threshold %	Tenderer's Proposal
SMART Meters	50%	
Prepaid Electricity Meters	70%	
Post-paid Electricity Meters	70%	

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

(Tick applicable box)

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

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):

Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

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

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

**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 together with Local Content Declaration Templates (Annex C, D and E) is accessible on <http://www.thedtic.gov.za/sectors-and-services-2/industrial-development/>. 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 with the bid documentation at the closing date and time 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

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- 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
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.**

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.

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 14 of the Preferential Procurement Regulations, 2017 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)**



**Annexure F3 - Imports Declaration-Supporting schedule to Annex C (Annex D)**



**Annexure F4 - Local Content Declaration-Supporting Schedule to Annex C (Annex E)**



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## ANNEXURE G

**SBD 1**


### PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	MWP1763DX	CLOSING DATE:	27 FEBRUARY 2023	CLOSING TIME:	10H00 SAST (GMT+2)
DESCRIPTION	PROVISION OF MANUFACTURING, SUPPLY AND DELIVERY OF SMART METERS WITHIN GAUTENG CLUSTER FOR A PERIOD OF 36 MONTHS, ON AN “AS AND WHEN” REQUIRED BASIS				
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					

<b>THE TENDER OFFICE</b>					
<b>MEGAWATT PARK TENDER OFFICE – NORTHSIDE</b>					
<b>NO. 01 MAXWELL DRIVE</b>					
<b>SUNNINGHILL</b>					
<b>GAUTENG</b>					
<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:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes	
	<input type="checkbox"/> No			<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>1. 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>2. 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

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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 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.

### 3. 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 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

#### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- **the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).**

1.2

- a) The value of this bid is estimated to **exceed** R50 000 000 (all applicable taxes included) and therefore the ..... preference point system shall be applicable; or
- b) Either, the 90/10 preference point system will be applicable to this tender.

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
<b>PRICE</b>	
<b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>	
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at

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any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

## 2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of Section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of Section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
  - 1) B-BBEE Status level certificate issued by an authorized body or person;
  - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of Section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

## 3. POINTS AWARDED FOR PRICE

### 3.1 THE 90/10 PREFERENCE POINT SYSTEMS

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

**90/10**

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

Where:

- P<sub>s</sub>** = Points scored for price of bid under consideration  
**P<sub>t</sub>** = Price of bid under consideration  
**P<sub>min</sub>** = Price of lowest acceptable bid

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#### 4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

- 4.1 In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)
1	10
2	9
3	6
4	5
5	4
6	3
7	2
8	1
Non-compliant contributor	0

#### 5. BID DECLARATION

- 5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:-

#### 6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 6.1 B-BBEE Status Level of Contributor: = ..... (maximum of 10 points)  
(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

#### 7. SUB-CONTRACTING

- 7.1 Will any portion of the contract be sub-contracted?  
(***Tick applicable box***)

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

7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted?  
.....%
- ii) The name of the sub-contractor .....

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- iii) The B-BBEE status level of the sub-contractor .....
- iv) Whether the sub-contractor is an EME or QSE

**(Tick applicable box)**

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

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

<b>Designated Group: An EME or QSE which is at least 51% owned by:</b>	<b>EME</b> √	<b>QSE</b> √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
<b>OR</b>		
Any EME		
Any QSE		

## 8. DECLARATION WITH REGARD TO COMPANY/FIRM

- 8.1 Name of company/firm: .....
- 8.2 VAT registration number: .....
- 8.3 Company registration number: .....
- 8.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

### 8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

### 8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Supplier
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

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8.7 Total number of years the company/firm has been in business: .....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the bidding process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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 forward the matter for criminal prosecution.

<p>WITNESSES</p>  <p>.....</p> <p>.....</p>	<p style="text-align: center;">.....</p> <p style="text-align: center;">SIGNATURE(S) OF BIDDERS(S)</p> <p>DATE: .....</p> <p>ADDRESS .....</p> <p style="text-align: center;">.....</p>
--	--

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## 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

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**

<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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2.2.1 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**

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.
- 3.5 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.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

---

<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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		<b>Review Date</b>	October 2027		

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

### Controlled Disclosure

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