	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

ESKOM HOLDINGS SOC LTD
REQUEST FOR PROPOSAL (RFP)

FOR

**MORTGAGE LOANS ORIGATION SOFTWARE APPLICATION SUPPORT AND
MAINTENANCE SERVICES FOR DURATION OF THREE (3) YEARS**

RFP number	MWP1706CX
Issue date	19 October 2022
Closing date and time	22 November 2022 at 10h00am Standard South African Time
Tender validity period	Six (6) months from the closing date and time
Clarification meeting	Clarification meeting will not be held; however clarification questions can be sent via email to: BeethaVM@eskom.co.za
Tenders are to be delivered to the following address on the stipulated closing date and time:	Eskom Megawatt Park Tender Office 1 Maxwell Drive and Witkoppen Road Northside (Retail Centre) Sunninghill – Sandton, 2157

Request for Proposal

Eskom Holdings SOC Ltd (hereinafter “Eskom”) invites you to submit a proposal for the Mortgage Loans Origination Software application support and maintenance services for a duration of three (3) years.

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

- Free of charge

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

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

Yours faithfully




Nothukela Sereo
ICT Procurement Manager

Date: 19 Oct 2022

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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

Number	Description	Annexure/to be downloaded and attached	Attached (Y/N/ N/A)
1.1.1	*Acknowledgement form	Annexure A	Y
1.1.2	*Tenderer's particulars	Annexure B	Y
1.1.3	*Integrity Declaration Form (refer to www.eskom.co.za for the Supplier Integrity Pact that suppliers are required to download and read)	Annexure C	Y
1.1.4	*CPA Requirements for Local Goods/Services	Annexure D	Y
1.1.5	*CPA(IG) for Foreign Goods/Services (if applicable)	Annexure E	Y
1.1.7	*SBD 1 -Invitation to Bid must be filled out by all tenderers and submitted with the tender at tender submission deadline	Annexure G	Y
1.1.8	*SBD 6.1- Preference Points Claim Form in terms of PPPFA 2017 regulations	Annexure H	Y
1.1.9	*SBD 4 – Bidders Disclosure	Annexure I	Y
1.1.10	Tax Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE	Annexure J	Y
1.1.11	Supplier Development & Localisation (SDL&I) Undertaking (if applicable)	Annexure K	Y
1.1.12	Pricing Information NB: Tenderer to use the prices formatting that is provided	Annexure L	Y
1.1.13	Quality Requirement	Annexure M	Y
1.1.14	SHE Requirements	Annexure N	Y
1.1.15	NEC 3 Terms Services Contract	Annexure O	Y

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

- 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 **Request for Proposal**; then the tenderers are required to download this from www.eskom.co.za. The “**Tender Data**” as detailed herein shall take precedence over the **Standard Conditions of Tender** in the event of any ambiguity or inconsistency between the two documents.

Clause Number from Standard Conditions of Tender	Tender Data
1.1 Parties	<p>The <i>Employer</i> is Eskom Holdings SOC Ltd</p> <p>The Eskom <i>Representative</i> is: Name: Violet Beetha Tel: 011 800 - 3012 E-mail: BeethaVM@eskom.co.za</p>
1.3 Enquiry documents	<p>The RFP number is : MWP1706CX</p> <p>See the content list above for the enquiry documents.</p>
1.4 Type of Invitation to Tender/RFP	<p>This RFP is:</p> <ol style="list-style-type: none"> 1. An open Invitation to tender
1.6 Eskom's rights to accept or reject any tender	The tender shall be for the whole of the contract.
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 ineligible to submit a proposal if</p> <ul style="list-style-type: none"> • Tenderers have the nationality of a country on any international sanctions list. A tenderer shall be deemed to have the nationality of a country if the tenderer is a national or is constituted, incorporated, or registered and operates in conformity with the provisions of the laws of that country. This criterion shall also apply to the determination of the nationality of proposed subcontractors or suppliers for any part of the Contract including related services. • Tenderers submit more than one proposal either individually or as a partner in a joint venture (JV) or consortium • Tender 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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

	<ul style="list-style-type: none"> 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 RFP process, if: <ul style="list-style-type: none"> (a) they have a controlling partner/majority shareholder in common; or (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 proposal of another Tenderer, or influence the decisions of the Employer regarding this bidding process; Tenders signed by non- authorized persons Where the tenderers are not registered on National Treasury's Central Supplier Database (except Foreign Suppliers) 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 Any tenderer that is restricted by National Treasury A tenderer that sub-contracts 100% Scope of Work. <p>Ineligible tenderers will be disqualified.</p>
2.2 -2.5 Tender Closing	<p>The deadline for RFP submission is: Date 22 November 2022 Time 10h00 am South African Standard Time</p> <p>Late Tenders will not be accepted</p> <p>Tenders are to be submitted to the Eskom <i>tender box</i> at the following physical address:</p> <p>THE TENDER OFFICE</p> <p>Eskom Megawatt Park Tender Office 1 Maxwell Drive and Witkoppen Road Northside (Retail Centre) Sunninghill – Sandton, 2157</p>
2.9 Copy of original tender	<p>The Tenderer must submit the tender as a two (2) hard copies:</p> <ul style="list-style-type: none"> One (1) complete original tender, PLUS One (1) hard copy of the original tender at tender submission deadline containing commercial and technical information Eskom may also require that one (1) additional complete soft copy of the original tender is submitted in electronic format. <p>Kindly split commercial and technical information in two (2) folders.</p> <ul style="list-style-type: none"> Cost breakdown to be in the commercial file. <p>The price schedule must be submitted in MS Excel and in PDF format (USB) on the template provided.</p>

Controlled Disclosure


When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

2.13 Tender Validity Period	The tender validity period is six (6) months
2.17 Clarification on enquiry documents	The tenderer will notify the <i>Employer</i> of any clarifications required before the closing time for clarification queries, which is five (5) working days before the deadline for tender submission.
2.23 Alternative tenders	<p>Alternative tenders are not allowed.</p> <p>If Alternative tender(s) are allowed, it may be based only on the following criteria and subject to acceptance by the <i>Employer</i>:</p> <ul style="list-style-type: none"> • A different completion date. • A different payment method. • Different technical methods and specifications <p>A different main option and other combinations of secondary option clauses, acceptable to Eskom as the Employer, selected from the NEC Engineering and Construction Contract</p>
2.25 Conditions of contract	<p>The conditions of contract will be the NEC Term Services Contract</p> <p>The recommended supplier shall submit all the documentation (Form A2 Baseline Training Plan, Form A3 Project Interim Report, Form A4 Supervisor Agreement, Form A5 Project Completion Report) that may be required as returnables after contract award as stipulated by Clause 4 of the Contract Skills Development Goals Standard (published in GGN 36760 of March 2020)</p> <p>The recommended supplier shall submit all the documentation (Annexure A-Targeted Enterprise Declaration Affidavit; Project Interim Report, Project Completion Report and Declaration) that may be required as returnables after contract award and as stipulated by Clause 3.3 of the Standard for Indirect Targeting for Enterprise Development through Construction Works Contract (published in GGN 36190 of 25 February 2013)</p>
2.31 Provision of security for performance	<p>Eskom reserves the right to request a Tenderer to provide Parent Guarantee / Performance Bond from the tenderer before contract award.</p> <p>A Performance Bond of 10% of the Total contract value will be required from the Tenderer whose financial standing is not in a position to can assume the financial obligations required to render the services for the Tenderer. The Performance Bond shall be from an institution approved by the Eskom Treasury department.</p> <p>Where a Parent Company Guarantee is required, the Parent Company Guarantee shall be in accordance with the proforma Guarantee specified in the NEC3 Terms Services Contract</p>
3.4 Opening of tenders	<p>Tenders will be opened at the same date and time as the tender deadline;</p> <p>Tenders will be opened on: Place: Eskom Megawatt Park, Sunninghill, Sandton 2157 Date: 22 November 2022</p>

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

 Eskom	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

	Time: 10h00 am Standard South African Time
3.5 Prices to be read out	Prices will not be read out.
3.9 Basic Compliance	<p>Basic compliance for this RFP are:</p> <ul style="list-style-type: none"> • Meet the eligibility criteria for a tenderer • Submit one (1) hard copy of the original tender to Eskom • Submit a complete original tender with commercial, financial and technical information • Submission of the mandatory commercial tender returnables as at stipulated deadlines. • Central Supplier Database (CSD) number (MAA.....)
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.
3.13 Functionality requirements	<p>Functionality requirements are applicable</p> <p>Detail technical evaluation criteria on page 21 – 23</p> <p>The following criteria will be applicable for this transaction under functionality criteria:</p>

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

No	Evaluation Criteria	Weight	Scoring
T1	The Consultancy Firm	20%	
	Number of years the supplier has provided maintenance, support and professional services for the Mortgage Loan Application software solution that integrates with external and internal software .		0 - 1 years = 25%
			2 - 4 years = 50%
			5 - 6 years = 75%
			7+ years = 100%
T2	The Consultancy Firm	5%	
	Provider has a local presence and will render the required support and services locally		Local presence = 100% No local presence = 0%
T3	Proposed Program and Methodology	5%	
	(Adequacy of the proposed work plan and methodology in responding to the bid)		0 - 1 years = 25%
			2 - 4 years = 50%
			5 - 6 years = 75%
			7+ years = 100%
T4	Resources for the Project	5%	
	Indicate the total number of years' experience of service provider human resources relevant to the scope of professional services which includes working experience in following Jboss Wildfly, Tibco iProcess, Postgres, Java, Tibco Ems, Tibco Administrator, Tibco Active Database Adapter, Tibco Workspace Browser, Experience in AngularJS, Experience ReactJS, Restful		1 - 2 years = 20%
			2 - 4 = 40%
			4 - 6 = 60%
			5 - 7 = 80%
			8+ years = 100%
T5	Skills Transfer	5%	
	The respondent must provide a skills transfer proposal.		Yes = 100% No= 0%
T6	Migration Plan	5%	Yes = 100% No= 0%
	Migration of the existing application software coded in C++ and Visual Basic namely Payroll Deduction application, Automated Statement Generation, Automated Letter Generation and Loan Account Statement Generator to a Java environment Eskom needs to migration the Loan Origination Software source code that is currently hosted by a third-party to EFC environment; and also migration of EFC Loan Origination Software application from MS Server 2008 operating system to MS Server 2016 operating system. This will require the service provider to provide the migration plan, detailing the approach of the information migration.	15%	Fully Compliant (Seamless automated info migration) = 100% Compliant with Associated Qualifications, risk (Manual information migration) = 66% 0 = Totally deficient or Non-responsive (m with unrecognised tools) = 33%

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

3.15 Evaluation of price

Prices will be evaluated as follows:

- Inclusive of VAT
- Making the specified correction for arithmetical errors
- Excluding contingencies in any bill of quantities or activity schedule.
- Making an appropriate adjustment for any other acceptable variations, deviations, or alternative tenders submitted.
- 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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

 Eskom	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

	<p>exchange fluctuations (if applicable) and on other evaluation parameters relating to uncertainty and risk, where applicable.</p> <ul style="list-style-type: none"> Unconditional discounts must be taken into account for evaluation purposes; Conditional discounts must not be taken into account for evaluation purposes but should be implemented when payment is effected. <p>Prices will be scored out of 80 points</p>
3.17 Evaluation of B-BBEE	<p>B-BBEE status will be scored out of 20 points in accordance with PPPFA.</p> <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 80 points for price and will score 0 points for B-BBEE level /status (out of 20)</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"> 80/20 (for estimated values above R30 000 and up to R50M inclusive of VAT) or state that either 80/20 will apply should there be a degree of uncertainty on which PPPFA Point allocation system will apply; the lowest acceptable tender will be used to determine the applicable preference system <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>
Contractual Requirements (if applicable)	<p>Contractual Requirements may include the following :</p> <ul style="list-style-type: none"> SHEQ requirements; SDLI requirements Financial statements; <p>Please Note: Contractual requirements are not evaluation criteria. They are required to be met and assessed after the evaluation and ranking of the tenders. Proof that the highest ranked tenderer is able to meet the contractual requirements, must be submitted prior to contract award.</p> <p>Failure to meet “Contractual Requirements “by the stipulated deadlines; may result in the tenderer being regarded as non-responsive and ineligible for contract award. In the event that there are further documents/actions that are required during execution of the contract, these must be made contractual conditions and compliance thereto must be managed in terms of the contract.</p>

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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 R100 000 0000 (One Hundred Million Rand), including VAT, Eskom is committed to paying Suppliers within 30 days of receipt of undisputed invoices.

For contracts valued above R100 000 0000 (One Hundred 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

“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;

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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
Basic Compliance	Two (2) hard copies of the tender	✓	
	“Proof of B-BBEE status level of contributor” for main contractor	✓	
	CSD number	✓	
	Signed Sub-contracting intent agreement	✓	
	“Proof of B- BBEE status level of contributor” 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)	✓	
Annexure A	Acknowledgement Form	✓	
Annexure B	Tenderers Particulars	✓	
Annexure C	Integrity Pact Declaration form	✓	
Annexure D	CPA for local goods/services (if applicable)	✓	
Annexure E	CPA(IG) for imported goods/services (if applicable)	✓	
Annexure G (applicable for all suppliers including Foreign suppliers)	SBD 1- to be completed and submitted by all tenderers.		✓
Annexure H	SBD 6.1- Preference Points Claim Form in terms of PPPFA 2017 regulations	✓	
Annexure I	SBD 4 – Bidders Disclosure	✓	
Supplier Development & Localisation (SD&L) Undertaking (if applicable)			✓
Additional Documents required in event of JV:-	Letter of intent to form a JV/consortium		✓

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

	Valid joint venture agreement confirming the rights and obligations of each of the joint venture partners and their profit-sharing ratios.		
	Written confirmation that the joint venture will operate as a single business entity (incorporated) for the duration of the contract (this may be included as an obligation within the JV agreement)		✓
	“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; (as may be applicable for the particular tendering entity)	✓	
	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.		✓
*“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;	Failure on the part of the supplier to submit “proof of B-BBEE status level of contributor” 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 on B-BBEE for purposes of PPPFA scoring and ranking.	✓	
Tax Clearance Certificates	A certified copy of a tax clearance certificate is still required by Foreign suppliers (with a footprint in South Africa- but who are not on CSD and have not provided a SARS pin number) and Local suppliers (who have not provided their SARS e-filing PIN number for		✓

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

	verification by Eskom and/or their CSD profile / CSD number) . Foreign suppliers with no footprint in South Africa, must still complete the SBD1 document, however no proof of tax compliance is required.		
Tax Evaluation Questionnaire (if services contract and was included as annexure)	Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE]		✓
Compliance with Employment Equity Act	To the extent that the tenderer falls within the definition of a “designated Employer” as contemplated in the Employment Equity Act 55 of 1998, the tenderer is required to furnish the Employer with proof of compliance with the Employment Equity Act, including proof of submission of the Employment Equity report to the Department of Labour. (South African tenderers only)		✓
NEC Documentation	Acceptance of NEC 3 Term services contract	✓	

DOCUMENTS REQUIRED UNDER CONTRACT REQUIREMENTS

Safety	COIDA - Original certificate of good standing or proof of application issued by the Compensation Fund (COID) or a licensed compensation insurer (South African tenderers only)		✓
Quality	Documents that may be required per scope of work		✓
Financial Statement	Audited Financial Statements of the <i>tenderer</i> for the previous 18 months, or to the extent that such statements are not available, for the last year. Tenderers must note that in the case of a joint venture or special purpose vehicle (SPV) especially formed for this tender, audited financial statements for each participant in the JV / SPV is required. Start-up enterprises formed within the last 12 months are not required to send in statements, but if successful with their tender will be required to send statements for the first year when once available.		✓

DOCUMENTS REQUIRED UNDER FUNCTIONALITY/TECHINICAL CRITERIA

Technical (required for functionality scoring)	1.. Technical returnable and evaluation criteria	✓	
	2.. Pricing Schedule	✓	

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

DETAIL SCOPE OF WORK

2.1 Application development, support and maintenance of Mortgage Loan Origination Software, Reporting and related IT services:

- a) For Java source code changes, fixes or enhancements identified by EFC – solution identification, systems requirements, application development and unit testing will be the responsibility of the service provider.
- b) Migration of the existing application software coded in C++ and Visual Basic namely Payroll Deduction application, Automated Statement Generation, Automated Letter Generation and Loan Account Statement Generator to a **Java environment**.
- c) Migration of EFC Loan Origination Software application from MS Server 2008 to Ms Server 2016.
- d) Migration of the interface to AngularJS or ReactJS
- e) Redevelopment of the Property Assessor Interface.
- f) Redesigning Reports – Management Information Systems (MIS) reports, statutory reports (SACCRA Daily and Monthly Reports), Loan Book, Loan Account Statement and Interest Rate Change letters to run in a Java environment.
- g) Migration of Loan Origination Software source code that is currently hosted by a third-party to EFC environment.
- h) To facilitate the transition of application development support from Service Provider to EFC

2. The successful bidder will be required to undertake, but not limited to, the following tasks:

- a) Business Analysis and determination of system requirements.
- b) Solution Design for system changes
- c) Effort Estimation (Quote) for development and implementation of changes
- d) Communication as required by EFC, at appropriate levels of the organization
- e) Technical Support of the systems including outside normal business hours as required
- f) Work with EFC in troubleshooting issues and by performing the following activities:
 - Defect tracking and resolution
 - Application Functionality Incident resolution
 - Software configuration management and versioning
 - Development and maintenance of system documentation
 - Application Development and build promotion
 - Unit testing and support for QA testing
 - Participation in Change Management Process
 - Meeting negotiated Response Time and Resolution Time Targets for defects and incidents
 - Regular Reporting

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

3. Account Management

The Service Provider shall designate in their proposal an Account Manager. All coordination for services with EFC and the Service Provider shall be the responsibility of this point of contact. The account manager shall ensure that any substitutions in Service Provider team personnel are approved by EFC 's project manager.

Report to EFC through reviews and meetings at various stages of the work program, as EFC requires. The work progress shall be measured against a defined budget and work schedule. EFC recognizes that project management is an essential part of this engagement, and to facilitate the transition of application development support from Service Provider to EFC t, a written bi-weekly progress report is required to be submitted during the transition period and consist of the actual schedule achieved overlaid on the original base schedule submitted by the Service Provider at the start up meeting. For instances where the schedule has not been achieved a brief written explanation as to why shall be included. The progress report can be submitted as an attachment to an e-mail.

The Service Provider shall be prepared to provide the following:

- a) Coordination of change and incident resolution and tracking.
- b) Communication of closure of change requests and incidents to EFC.
- c) A change report for every change requested, detailing the application changes made by the request, including:
 - o Date Change Request was received by the vendor
 - o Title and Description of Change Request
 - o Application(s) Affected
 - o Summary of Actual Changes Implemented
 - o Test Results
 - o Implementation Date
 - o Other
- d) Series of incident summary reports during the active election cycle, including the following details, and at the frequency shown in the table below:
 - o Date and Time Incident was received by the vendor
 - o Title and Description of Incident
 - o Application(s) Affected
 - o Resolution(s) Implemented
 - o Test Scripts & Results
 - o Resolution Time and Date (when communicated to the EFC)
 - o Elapsed Resolution Time and comparison to target
 - o Root Cause Analysis
 - o Other
- e) The Service Provider Account Manager must be the single point of contact for the EFC to:
 - o Receive requirements;
 - o Provide system requirements;
 - o Communicate with EFC IT project team via e-mail, phone, and meetings;
 - o Be an escalation point for any issues and questions;

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

- o Return a detailed Quote and Statement of Work (SOW) within the period defined in the **Support Requirements**, after receiving specifications for specific work assigned; and
- o Report regularly on activities and progress of various assignments.

4. Deliverables

- 5.1. The Service Provider will provide service delivered by qualified personnel that have the expertise required to assist EFC IT in all aspects of application support, development and maintenance services. These services include, but are not limited to:
 - a) Analysis;
 - b) Programming/software development/engineering/build package promotion with industry- standard level code commenting;
 - c) Environment management;
 - d) Software configuration management and versioning;
 - e) Development and maintenance of software and solution documentation including, but not limited to system requirements, design, and functional specification documentation;
 - f) Unit testing;
 - g) Compliance with industry standard ITIL software development lifecycle processes;
 - h) Support for quality assurance testing;
 - i) Consulting; and,
 - j) Project management.
- 5.2. Specifically, the technical resources must have relevant experience in the following tools and techniques:
 - a) Experience in Microsoft Visual Studio 2013 development environment;
 - b) Experience in Windows Server 2016 R2;
 - c) Experience in developing and supporting applications written in latest java version;
 - d) Experience in developing with Microsoft SQL Server 2016 database, including database design and developing stored procedures;
 - e) Experience in development of mobile applications and responsive design;
 - f) Experience in Object Oriented Development;
 - g) Experience in Web Services Development using RESTful APIs (JSON and HTML5);
 - h) Experience in JavaScript development with HTML5.
 - i) Experience in Java
 - j) Experience in JBoss Wildfly 8.2.0
 - k) Experience in TIBCO EMS 8.1
 - l) Experience in TIBCO iProcess 11.4.1
 - m) Experience in TIBCO Workspace Browser 11.4.2
 - n) Experience in TIBCO iProcess Technical plugin 11.4.1
 - o) Experience in TIBCO iProcess Workspace plugin 11.4.1
 - p) Experience in TIBCO Business Works iProcess plugin Database
 - q) Experience in Postgres 9.4
 - r) Experience in TIBCO RV 8.4.2
 - s) Experience in TIBCO TRA 5.9

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		


- t) Experience in TIBCO AMX BW 5.12
 - u) Experience in TIBCO Administrator 5.9
 - v) Experience in TIBCO Active DataBase Adapter
 - w) Experience in AngularJS
 - x) Experience in ReactJS
- 5.3. The Service Provider must screen and provide qualified personnel with proven experience in the discipline required. The screening process must include a criminal background check, as well as verification of education, work history, and references.
- 5.4. The Service Provider must provide EFC with a formal, written notice with corresponding background checks, each time the approved contractor staff list changes.
- 5.5. The Service Provider reserves the right to perform its own background check in addition to any checks provided by the Service Provider.
- 5.6. Corrective Action Plan – The Service Provider must have a process for replacing individuals that are not qualified or problematic as determined by the EFC. This corrective action plan will have no cost to EFC.
- 5.7. Qualified personnel provided by the Service Provider must:
- a) follow Eskom Group IT's processes and procedures; and
 - b) provide source code(s) and documentation to EFC for each assignment, when applicable.

5. Nature of Contract

- 6.1. The Service Provider will receive written specifications/requirements for specific work to be performed. Within the period of receiving these specifications, the Service Provider must return a detailed proposal or Statement of Work that:
- a) details the proposed technical solution option(s) and scope;
 - b) details the resource requirements, confirmation of rates including total fee, deliverables, and detailed timeline including number of hours of work;
 - c) fully documents qualified personnel to fulfil roles specified in the plan – including résumé(s) and verification of the screening process; EFC reserves the right to review and screen résumés for any personnel recommended by the Service Provider; and
 - d) provides a change request process for approval by EFC for any changes in qualified personnel, costs, or deliverables prior to the change taking place.
- 6.2. The Service Provider will evaluate the SOW(s) received and approve and prioritize work to the Contractor. The SOW must be approved by the Service Provider prior to the delivery of services.
- 6.3. Service Provider must provide advanced notification to EFC once 80% of the total value of a particular SOW has been reached or exceeded.
- 6.4. Service Provider must provide regular reports of activity for all current SOWs in progress and a list of all SOWs completed within that month.
- a) Electronic copies of all information (reports, drawings, and calculations, e.g., spreadsheets, computer model data files, etc.) shall be provided to EFC via e-mail. All reports are to be provided electronically, each as a single PDF file that includes the report text and all figures, diagrams, and drawings presented. Reporting shall include:

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

- A change report for every change requested, detailing the application changes made by request, including:
 - Date Change Request was received by the vendor
 - Title and Description of Change Request
 - Application(s) Affected
 - Summary of Actual Changes Implemented
 - Test Results
 - Implementation Date
 - Other
 - b) A series of incident summary reports during the active election cycle, including the following details, and at the frequency shown in the table below:
 - Date and Time Incident was received by the vendor
 - Title and Description of Incident
 - Application(s) Affected
 - Resolution(s) Implemented
 - Test Results
 - Resolution Time and Date (when communicated to the EFC)
 - Elapsed Resolution Time and comparison to target
 - Other
 - c) The Service Provider shall clearly label all digital records.
 - d) All material produced and information collected by the Service Provider in performance of these terms of reference shall become the property of EFC. All material shall be kept confidential by the Service Provider unless authorized in writing by EFC.
- 6.5. **The contract will be period of three (3) years, however, during the first year of the contract i.e., 2022 to 2023, the service provider will provide support and maintenance services fulltime at client's premises and thereafter, the service provider will provide support on time and material basis on a time and material basis.**

6. Service Level Agreement requirements

The aim of this agreement is to provide a basis for close co-operation between EFC and the vendor, for services to be provided to EFC, thereby ensuring that timely and efficient support services are available to EFC and its end-users.

7.1 Service Level Definition

Depending on the criticality and severity of calls, service levels are defined as follows:

Severity Level 1	Severity Type	Definition
S1	Critical Problems	A problem which affects more than one department's work/line of business,
S2	Major Problems	A problem that affects a particular department/section.
S3	Moderate Problems	A problem that affects a typical user group e.g. Non-availability/failure of any module etc.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

 Eskom	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

S4	Minor Problems	A problem that affects a typical user
----	----------------	---------------------------------------

7.2 Service Level Target

The following table defines Service Level Targets for Response and Resolution time for bug fixing.

Severity Level	Max. Resolution Time
S1	One Day
S2	Two Days
S3	Three Days
S4	Four Days

Example: in case problem is reported on 1st January and the severity level is of S1, the schedule delivery date will be 2nd January.

For new development or enhancements, the vendor will follow the norms of Software Development Life Cycle process and the time limit will be fixed based on the task and complexities involved as may be agreed after mutual discussion.

Example: For new development or enhancement if time limit is of 5 days and work commences on 1st January, the schedule delivery date will be 5th January.

7.3 Penalty

Penalty @5% of the invoice amount per person per day (responsible for delivery) multiply by number of days delayed may be levied/deducted in the event of overshooting of delivery date in respect of bug fixing, enhancement, modification or new development. Number of days delayed = 'Actual delivery date' less 'Schedule delivery date'.

Example: if delay is of 2 days:

a) 5 % of R300/- * 2; 15 * 2 = R. 30/- (Developer)

b) 5 % of R.400/- * 2; 20 * 2 = R. 40/- (Project Manager)

c) Total(a + b) = R 70.00

(Assuming per day resource cost of developer is R300.00 and project manager is R400.00)

7. Technical Evaluation Criteria

The Technical evaluation will be conducted in two stages:

Stage 1: Compliance with Technical requirements

Stage 2: Presentation of the Proposed Program Management Services

The Technical evaluation will be done based on the following general areas:

- I. Specific experience of the consultancy firm and proposed resources
- II. Relevant references from previous assignment
- III. Proposed Program Control Methodology

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

 Eskom	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

Stage 1: Compliance with Technical requirements

The minimum technical score required to pass: Eighty percent (80%). Bidders scoring eighty (80%) and above in the technical evaluation shall be called upon at short notice to give presentation to a tender processing team on the proposed Program Management Services as per the requirements of this tender.

Stage 2: Presentation of the Proposed Program Management Services

Bidders that score at least 80% in Stage 1 (technical requirements) shall be called upon at short notice to give presentation to a tender processing team on the proposed Program Management Services as per the requirements of this Request.

The final technical score shall be computed as follows:

TE – Technical Evaluation Score (out of 100%)

P – Presentation score (out of 100%)

Total Score is the sum of Stage 1 score (weighted on 80%) plus Stage 2 score (weighted on 20%).

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

DETAIL EVALUATION CRITERIA

The Technical evaluation will be conducted in two stages:

Stage 1: Compliance with Technical requirements

Stage 2: Presentation of the Proposed Program Management Services

The Technical evaluation will be done based on the following general areas:

- IV. Specific experience of the consultancy firm and proposed resources
- V. Relevant references from previous assignment
- VI. Proposed Program Control Methodology

Stage 1: Compliance with Technical requirements

No	Evaluation Criteria	Weight	Scoring	Evidence required	Evaluators Response (put actual percentage)
T1	The Consultancy Firm	20%		Signed reference on letterhead by the Service Provider	0
	Number of years the supplier has provided maintenance, support and professional services for the Mortgage Loan Application software solution that integrates with external and internal software .		0 - 1 years = 25%		
			2 - 4 years = 50%		
			5 - 6 years = 75%		
			7+ years = 100%		
T2	The Consultancy Firm	5%		Signed customer reference letter to be provided by customer stating the number of years that the service has been rendered for the proposed solution / products	0
	Provider has a local presence and will render the required support and services locally		Local presence = 100% No local presence = 0%		
T3	Proposed Program and Methodology	5%		Assignment (the work plan) and Timeliness of output	0
	(Adequacy of the proposed work plan and methodology in responding to the bid)		0 - 1 years = 25%		
			2 - 4 years = 50%		
			5 - 6 years = 75%		
			7+ years = 100%		
T4	Resources for the Project	5%		Provide detailed CV's indicating the number of years experience related to scope of work which include working experience of the following: PL SQL, Tibco, Java, software Integration tools	0
	Indicate the total number of years' experience of service provider human resources relevant to the scope of professional services which includes working experience in following: Jboss Wildfly, Tibco iProcess, Postgres, Java, Tibco Ems, Tibco Administrator, Tibco Active Database Adapter, Tibco Workspace Browser, Experience in AngularJS, Experience ReactJS, Restful		1 - 2 years = 20%		
			2 - 4 = 40%		
			5 - 7 = 80%		
			8+ years = 100%		
T5	Skills Transfer	5%		Please provide detailed proposal on skills transfer	0
	The respondent must provide a skills transfer proposal.		Yes = 100% No= 0%		
T6	Migration Plan	5%	Yes = 100% No= 0%	Signed reference on OEM letterhead by the Service Provider	0
	Migration of the existing application software coded in C++ and Visual Basic namely Payroll Deduction application, Automated Statement Generation, Automated Letter Generation and Loan Account Statement Generator to a Java environment Eskom intends to migrate the Loan Origination software source code that is currently hosted by a third-party to EFC environment, and also migration of EFC Loan Origination Software application from MS .Net 2008 application to .Net 4.0	15%	Fully Compliant (Seamless automated information migration) = 100% Compliant with Associated Qualifications, minimal risk (Manual information migration) = 66% 0 = Totally deficient or Non-responsive (migration with unrecognised tools) = 33%	Provide the detailed Migration Plan and Approach.	0
T7	Experience in third-party software integrations that include Attorneys, Assessors, Credit Bureaus, Payroll, Core banking system, and SACCRA. Highlight projects where such third party systems integrations were implemented. External interfaces(Credit Bureaus, Assessor interface, Attorneys) Interfaces Interfaces(SAP Payroll, SAP Payroll, Core Banking Software)	8%	1= 100% 2 = 66% 3 = 33%	Detailed plan by service provider	0
T8	What is the timeframe to implement the solution from start to a fully operational?	10%	< 3 months = 100%	Signed references to be given for experience whom we may contact for references	0
			> 3 months - < 6 months = 75%		
			> 6 months - < 1 year = 50 %		
			> 1 year = 25%		

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

T9	Migration of automated reports to Java Management Information Systems (MIS) reports Statutory reports (SACCRA Daily and Monthly Reports) Loan Book Loan Account Statement (Ad-hoc, Quarterly, Bi-annual and Annual) Interest Rate Change letters	10%	1 = 20% 2 = 40% 3 = 60% 4 = 80% 5 = 100%	Signed reference by the Service Provider	0
T10	Experience in the following software and tools: 1) Windows Server 2016 R2 2) Developing and supporting applications written in latest Java version 3) Web Services Development using RESTful APIs (JSON and HTML5) 4) JavaScript development with HTML5 5) JBoss Wildfly 8.2.0 6) TIBCO EMS 7) TIBCO iProcess 8) TIBCO iProcess Workspace plugin 9) TIBCO Business Works iProcess plugin Database 10) Postgres 11) TIBCO RV 12) TIBCO TRA 13) TIBCO AMX BW 14) TIBCO Administrator 15) AngularJS 16) ReactJS 17) TIBCO Workspace Browser 18) TIBCO iProcess Technical plugin	10%	1 = 5% 2 = 10% 3 = 15% 4 = 20% 5 = 25% 6 = 30% 7 = 35% 8 = 40% 9 = 45% 10 = 50% 11 = 55% 12 = 60% 13 = 65% 14 = 70% 15 = 75% 16 = 80% 17 = 85% 18 = 100%	Signed reference by the Service Provider	0
T11	Legal Does the Supplier have a confidentiality policy with regards to its employees, partners and subcontractors?	2%	Fully Compliant - respondent has a policy covering Eskom legal requirements = 100% The respondent does have a policy but does not sufficiently cover all Eskom legal requirements = 65% 0 = Totally deficient or Non-responsive - Respondent does not have policy = 33%	Provide your privacy policy	0
Total		100.00%			

The minimum technical score required to pass: Eighty percent (80%). Bidders scoring eighty (80%) and above in the technical evaluation shall be called upon at short notice to give presentation to a tender processing team on the proposed Program Management Services as per the requirements of this tender.

Stage 2: Presentation of the Proposed Program Management Services

Bidders that score at least 80% in Stage 1 (technical requirements) shall be called upon at short notice to give presentation to a tender processing team on the proposed Program Management Services as per the requirements of this Request.

Evaluation Criteria					
Note	Evaluation Criteria	Specifics	Weight	Scoring	Evidence required
1	Clarity on the scope of the assignment	- Defining the sub projects involved and enumeration of activities involved in each - Understanding of proposed methodologies proposed for each work stream	25.00%	5 = Fully Compliant (Scope of work covers EFC's requirements) 4 = Compliant with some EFC's requirements 0 = Non-compliant, responder will address the requirements	The responder must provide a detailed scope of work to demonstrate the understanding of work assignments - confirming that the technology has the capability.
2	Clear understanding of the deliverables	- Enumeration of all the deliverables as listed - Additional deliverables for consideration	10.00%	5 = Fully Compliant (Responder fully understand the requirements and assigned tasks) 2 = Non-compliant, major risk (The responder does not understand key requirements) 0 = Totally deficient or Non-responsive	The responder must provide a detailed work document to demonstrate understanding of deliverables
3	Project Life Cycle	The consultant should be clear on the activities to be undertaken	10.00%	5 = Fully Compliant (Project life cycle is clear and objective achievable) 2 = Non-compliant, major risk (The project life cycle is inadequate) 0 = Totally deficient or Non-responsive	The responder must provide a detailed project plan
4	Understanding of EFC's needs	Understanding of the requirements of the scope of work and the client's organizational structure - Acceptable proposed approach to change and incident support - Value added propositions and recommendations - Attention to relevant challenges that the EFC has not considered	20.00%	5 = Fully Compliant (responder fully understand EFC's needs) 4 = Compliant with key needs but not all 2 = Non-compliant, major EFC needs are missing 0 = Totally deficient or Non-responsive	Responder must demonstrate a clear understanding of EFC's needs
5	Experience in Post Implementation Review	- Previous and current experience in Post Implementation Review.	10.00%	5 = More than 3 references provided 4 = 2 or 3 references provided 2 = 1 references provided 0 = Either no references provided or references provided were older than 2015	The responder must demonstrate the experience in providing post implementation review
6	Specific value additions the firm will provide in the delivery of services	- Add value activities that the service provider will provide at no costs to EFC.	10.00%	5 = Fully Compliant (responder will provide value adding activities) 4 = Compliant with key value activities provided 2 = Non-compliant, minor value adding activities provided	The responder must demonstrate the value adding activities to be provided to the EFC
7	Transition Plan for application support from Service Provider to EFC	- Roadmap and schedule of activities to be performed.	15.00%	5 = Bidder's proposal on how they plan to perform skills transfer specifies the following: a) Software Development b) Skills transfer plan for operational support and c) configuration management 4 = Bidder's skills transfer proposal only specifies 2 of the above criteria 2 = Bidder's skills transfer proposal only specifies 1 of the above criteria 0 = No skills transfer proposal/proposal does not meet specified criteria	The responder must provide detailed proposal on skills transfer
Total			100.00%		FINAL SCORE

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

The final technical score shall be computed as follows:

TE – Technical Evaluation Score (out of 100%)


P – Presentation score (out of 100%)

Total Score is the sum of Stage 1 score (weighted on 80%) plus Stage 2 score (weighted on 20%).

The Bidders that score 80% and above shall qualify for the final stage of the evaluation

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

ANNEXURE A

ACKNOWLEDGEMENT FORM

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

1.	
2.	
3.	

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

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

Or: Incorrect or incomplete for the following reasons: ☐

Cataloguing Acknowledgement:

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

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

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

Invitation to Tender/Request for Proposal No: _____

Name of company/JV: _____

Country of registration: _____

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

Name of contact person: _____

Contact details of contact person:

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

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	

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

Unincorporated Joint venture (registration number for each member of the JV)	
Incorporated JV	
Other	

Please complete the following:


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

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

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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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
5. Alternatively, you may contact [•] ***[insert the name and contact details of the relevant person from Eskom's Vendor Management department, who can assist you further with the registration on CSD].***
6. If you are registered on SARS Efiling system, please provide your pin number in order to verify your tax compliant status _____
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 Efiling pin, please confirm that you have attached/will send a copy of a current valid tax compliant certificate as a tender returnable (by contract award stage).

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

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

8.1 Confirm if you intend sub-contracting

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

8.2 What percentage will you be sub-contracting? _____%

8.3 To whom do you intend sub-contracting? _____

8.4 Is the said sub-contractor registered on CSD?

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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

8.5 If yes to 8.4, please provide CSD number. _____

8.4 Please confirm B-BBEE level of said sub-contractor _____

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

- a. Black people
- b. Black people who are youth
- c. Black people who are women
- d. Black people with disabilities
- e. Black people living in rural or underdeveloped areas or townships
- f. Cooperatives which are 51% owned by Black people
- g. Black people who are military veterans

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 30% minimum 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	
-----	--	----	--

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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

 Eskom	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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

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/RFP at tender closing. Failure to fully complete the form and/or

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

submit relevant supporting documents and/or sign will result in the tender not being evaluated further.

1. 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:-

- the *tenderer/s* employees/directors are also employees/contractors/consultants/ directors in the state or a state owned entity.
- the *tenderer/s* employees/directors are also employees/contractors/consultants/ directors of Eskom
- the *tenderer/s* employees/directors are also employees/contractors/consultants or directors in another entity together with Eskom employees/consultants/contractors/ directors
- 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:-
 - an individual is related to another individual if they are married, or live together in a relationship similar to marriage;
 - or are separated by no more than two degrees of natural or adopted consanguinity or affinity;
 - 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:-**
 - (1) either of them directly/indirectly controls the other, or the business of the other, as determined in accordance with the definition of “control” (as per Companies Act section 2(1)) ;
 - (2) either is a subsidiary of the other; or
 - (3) a person directly/indirectly controls each of them, or the business of each of them, as determined in accordance with the definition of “control”
- the *tenderer/s* and one or more of the *tenderers* in this tendering/RFP process have a controlling partner in common, or a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another tenderer, or influence the decisions of Eskom regarding this bidding process;

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

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/	Full Names & Capacity/Position of Eskom employee/ director/ consultant and details of the relationship or	To your knowledge is this person involved in the
--	--------------------	---	--	---

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

		director.	interest (marital/ familial/personal/ financial etc.)	evaluation/ adjudication/ negotiation of tenders

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

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

2. DECLARATION OF FAIR TENDERING PRACTICES

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

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

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

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

Item	Question	Yes	No
------	----------	-----	----

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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><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></p> <p>The Database of Restricted Suppliers can be accessed on the National Treasury's website (www.treasury.gov.za).</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 (www.treasury.gov.za).</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	Is there any history/record of the <i>tenderer/s (or any of its directors/members/shareholders)</i> failing to meet their contractual obligation with any SOC?		

3. DECLARATION OF SHAREHOLDING INFORMATION

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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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/proposal may

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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

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

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

Signature:	
Designation and capacity in which signing	
Date:	

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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

and any contract resulting from it on behalf of _____ (insert the full legal name of the JV); and

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

Signature:	
Designation and capacity in which signing	
Date:	


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

ANNEXURE D

CPA REQUIREMENTS FOR LOCAL GOODS AND SERVICES (SOUTH AFRICA)

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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

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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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.

Labour	Commodities	Processed material	Transport	Others
Labour general (hourly paid) SEIFSA, C3, actual labour cost	Steel StatsSA, P0142.1 Table 2, basic iron and steel	Mechanical engineering material SEIFSA, G, mechanical engineering material	SEIFSA, L2, road freight costs	StasSA, PO141 CPI (Headline) all items OR SEIFSA, D-2 (CPI)
	Copper SEIFSA, F, copper metric ton	Electrical engineering material SEIFSA, G-1, electrical engineering material		
Labour general SEIFSA, C3 (a), actual labour cost (field force) where subsistence allowance is paid	Aluminium SEIFSA, R, aluminium	Building and construction material SEIFSA, G, building and construction material		StasSA, PO142.1), PPI <ul style="list-style-type: none">Final Manufactured GoodsOrIntermediate Manufactured Goods ORSEIFSA Table U
	Zinc SEIFSA, F, zinc			
	Lead SEIFSA ,F, lead			

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

				Producer Price Index (PPI) - final manufactured GOODS OR Intermediate Manufactured Goods
--	--	--	--	---

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			
	LME, zinc	National Statistical Institute, Country-specific building and construction material		
	LME, lead			

Closing date of tender _____/_____/_____

TENDERER'S SIGNATURE _____

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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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

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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

[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)

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

PART 3: ADJUSTMENT OF IMPORTATION COSTS, ETC

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

	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	

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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.

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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

- 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 _____

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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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)

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

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

- 1.6. 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 minimum threshold

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

_____ %

_____ %

_____ %

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

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.

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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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.thdti.gov.za/industrialdevelopment/ip.jsp>. 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
- (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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

- (d) I accept that the Procurement Authority / Institution has the right to request that the local content be verified in terms of the requirements of SATS 1286:2011.
- (e) I understand that the awarding of the bid is dependent on the accuracy of the information furnished in this application. I also understand that the submission of incorrect data, or data that are not verifiable as described in SATS 1286:2011, may result in the Procurement Authority / Institution imposing any or all of the remedies as provided for in Regulation 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 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:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					
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 _____					

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11	
		Effective Date	August 2022			
		Review Date	August 2027			

BOX SITUATED AT (STREET ADDRESS)

SUPPLIER INFORMATION					
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			
	<input type="checkbox"/>	NAME:			
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs& QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
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)		
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:			TECHNICAL INFORMATION MAY BE DIRECTED TO:		
DEPARTMENT/ PUBLIC ENTITY		CONTACT PERSON			
CONTACT PERSON		TELEPHONE NUMBER			

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

TELEPHONE NUMBER		FACSIMILE NUMBER	
FACSIMILE NUMBER		E-MAIL ADDRESS	
E-MAIL ADDRESS			

PART B TERMS AND CONDITIONS FOR BIDDING

1.	BID SUBMISSION:
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR ONLINE
1.3.	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.
1.4.	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.
1.5.	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.
2.	TAX COMPLIANCE REQUIREMENTS
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	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.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
2.6	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
3.1.	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.4.	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> 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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

1. GENERAL CONDITIONS

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

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- a) The value of this bid is estimated to **exceed/not exceed** R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or
- b) Either the 80/20 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.2 Points for this bid shall be awarded for:

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

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

	POINTS
PRICE	80
B-BBEE STATUS LEVEL OF CONTRIBUTOR	20
Total points for Price and B-BBEE must not exceed	100

1.4 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.

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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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 80/20 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid


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)	Number of points (80/20 system)
1	10	20
2	9	18

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	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 or 20 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	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

- 7.1.1 If yes, indicate:

- What percentage of the contract will be subcontracted.....%
- The name of the sub-contractor.....
- The B-BBEE status level of the sub-contractor.....
- Whether the sub-contractor is an EME or QSE

(***Tick applicable box***)


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

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

Designated Group: An EME or QSE which is at least 51% owned by:	EME	QSE
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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		
Black people who are military veterans		
OR		
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

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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

[TICK APPLICABLE BOX]


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
 - (e) forward the matter for criminal prosecution.

<p>WITNESSES</p> <p>1.</p> <p>2.</p>	<p>.....</p> <p>SIGNATURE(S) OF BIDDERS(S)</p> <p>DATE:</p>
--	---

reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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 interest¹ 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

¹ 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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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

2.2.1 If so, furnish particulars:

.....
.....

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

2.3.1 If so, furnish particulars:

.....
.....

3 DECLARATION

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

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

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

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.

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

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

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

² 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.

Controlled Disclosure

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30

	Request for Proposal (RFP)	Document Identifier	240-114238630	Rev	11
		Effective Date	August 2022		
		Review Date	August 2027		

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.

3.6 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

When downloaded from the document management system, this document is uncontrolled and the responsibility rests with the user to ensure it is in line with the authorized version on the system. No part of this document may be reproduced in any manner or form by third parties without the written consent of Eskom Holdings SOC Ltd, © copyright Eskom Holdings SOC Ltd, Reg No 2002/015527/30