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

**ESKOM HOLDINGS SOC LTD**

**INVITATION TO TENDER**

**FOR**


**Engineering, Procurement and Construction contract to complete detail designs and construction designs, buy, deliver and install 500 MVA 400/132/22 kV 2nd transformer, extend the 400kV busbar and equip the 400kV feeder and 132 kV feeder at Kappa Substation.**

|                               |  |
|-------------------------------|--|
| <b>Tender number</b>          | <b>MWP2350TX</b>   |
| <b>Issue date</b>             | <b>05 December 2023</b>  |
| <b>Closing date and time</b>  | <b>07 March 2024 at 10h00</b>  |
| <b>Tender validity period</b> | <b>12 weeks from the closing date and time</b>   |
| <b>Clarification meeting</b>  | <p>A non-compulsory clarification meeting will be held as follows:</p> <p><b>from 10h00am SAST – 12h00pm SAST.</b></p> <p>This will be held via Ms Team. via the following <b>link</b>:</p> <p>Time: 10H00 to 12H00<br/>Date: 24 January 2024<br/>Venue: MS Teams</p> <p><a href="#">Click here to join the meeting</a></p> <p>Microsoft Teams meeting<br/><b>Join on your computer, mobile app or room device.</b></p> <p>Site clarification meeting will be held at Kappa Substation:</p> <p>Time: 10H00 to 12H00<br/>Date: 06 February 2024<br/>Venue: Kappa Substation</p> <p>Kappa 500 MVA 400/132/22kV Trfr2 project works will be within the boundaries of Kappa substation</p> |

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|  | <p>located Witzenberg Municipality, 60km from Ceres Town, Western Cape, South Africa.</p> <p>One must drive 40km on a gravel road that has no cell phone connection to reach the substation.</p> <p>The coordinates of the substation are:</p> <table border="1" data-bbox="769 555 1485 689"> <thead> <tr> <th>MTS</th> <th>Latitude</th> <th>Longitude</th> </tr> </thead> <tbody> <tr> <td>KAPPA</td> <td>33.106256S</td> <td>20.009234E</td> </tr> </tbody> </table> <p><b>Note:</b><br/>Tenderers to do a regular check on Eskom tender bulletin for any tender addendums, as all clarification pertaining to this tender will be uploaded on that platform. It is the responsibility of the Tenderer to check the tender bulletin for updates and to ensure their response to the tender provides for information communicated also through the tender bulletin.</p> | MTS        | Latitude | Longitude | KAPPA | 33.106256S | 20.009234E |
|--|--|------------|----------|-----------|-------|------------|------------|
| MTS  | Latitude   | Longitude  |          |           |       |            |            |
| KAPPA  | 33.106256S   | 20.009234E |          |           |       |            |            |
| <b>Tenders are to be delivered to the following address on the stipulated closing date and time:</b> | <b>Eskom Megawatt Park - Tender office<br/>North Side<br/>Maxwell Drive</b>  |            |          |           |       |            |            |

## Invitation to Tender/Request for Proposal

Eskom Holdings SOC Ltd (hereinafter “Eskom”) invites you to submit a tender for the **Engineering, Procurement and Construction contract to complete detail designs and construction designs, buy, deliver and install 500 MVA 400/132/22 kV 2nd transformer, extend the 400kV busbar and equip the 400kV feeder and 132 kV feeder at Kappa Substation.**

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

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

Tenderers must refrain from communicating issues related to this tender with any person within the Eskom environment other than the Eskom Representative named in the RFP during the tender process. Tenderers must not in any way contact any Eskom employee who is involved in the tender during the tender process, either telephonically, by email or through private appointments before and after submitting tenders. Eskom

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employees not involved in this tender are not allowed to contact employees involved in this tender or provide information about the tender to potential tenderers.

Where a potential tenderer or a tenderer has any question or query on the contents of the tender or any issue related to the tender, the first point of contact is the *Eskom Representative* whose name and contact details are stated in the tender document.

Should the tenderer not be satisfied with a response from the Eskom Representative stated in the tender document, and would like to escalate, the tenderer may refer the issue with to the Procurement Manager identified in the letter of invitation through the buyer. Should the tenderer still be dissatisfied, it can then escalate the matter to the Middle Manager or Senior Manager Procurement.

Escalation of tender issues to the Group Executives or Group Chief Executive Officer is an avenue of last resort and tenderers should refrain from escalating tender issues to this level without following the escalation process set out above. Escalation not following the above process is not acceptable and will not be attended to.

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

1. Free of charge

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

Queries relating to these Invitation to tender documents may be addressed to the Eskom Representative.

Yours faithfully

  
 \_\_\_\_\_  
 Lungile Gcwensa  
 Procurement Manager  
 Transmission Division

Date: 2023.12.05

  
 \_\_\_\_\_  
 Transmission/Projects Delivery  
 Rose Kgosana(Project Manager)

Date: 2023.12.05

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

| Number | Description   | Annexure/to be downloaded and attached   | Attached (Y/N/ N/A) |
|--------|---|--|---------------------|
| 1.1.1  | *Acknowledgement form   | Annexure A   | Y                   |
| 1.1.2  | *Tenderer's particulars   | Annexure B   | Y                   |
| 1.1.3  | *Integrity Declaration Form (refer to <a href="http://www.eskom.co.za">www.eskom.co.za</a> for the Supplier Integrity Pact that suppliers are required to download and read)  | Annexure C   | Y                   |
| 1.1.4  | *CPA Requirements for Local Goods/Services  | Annexure D   | Y                   |
| 1.1.5  | *CPA(IG) for Foreign Goods/Services (if applicable)   | Annexure E   | Y                   |
| 1.1.6  | SBD 6.2- Declaration Certificate for Local Production and Local Content (only applicable if designated materials are included).<br><br>Annexure C-Local Content Declaration-Summary Schedule<br><br>Annexure D-Imported Content Declaration – Supporting Schedule to Annexure C<br><br>Annexure E-Local Content Declaration-Supporting Schedule to Annexure C | Annexure F1<br><br>Annexure F2<br><br>Annexure F3<br><br>Annexure F4   | Y                   |
| 1.1.7  | *SBD 1 -Invitation to Bid must be filled out by all tenderers and submitted with the tender at tender submission deadline   | Annexure G   | Y                   |
| 1.1.8  | *SBD 6.1- Preference Points Claim Form in terms of PPPFA 2022 regulations   | Annexure H   | Y                   |
| 1.1.9  | *SBD 4 – Bidders Disclosure   | Annexure I   | Y                   |
| 1.1.13 | Contract Skills Development Goals (CSDG)  | <i>To be downloaded from CIDB (Form A1 List of Recognised Skills Development Agencies, Form A2 Baseline Training Plan, Form A3 Project Interim Report, Form A4 Supervisor Agreement, Form A5</i> | Y                   |

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|        |                                    |  |   |
|--------|------------------------------------|--|---|
|        |                                    | <i>Project Completion Report</i>   |   |
| 1.1.14 | Contract Participation Goals (CPG) | <i>To be downloaded from CIDB (Annexure A- Targeted Enterprise Declaration Affidavit; Project Interim Report, Project Completion Report and Declaration)</i> | Y |

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

| Clause Number from Standard Conditions of Tender  | Tender Data   |
|---|---|
| 1.1 Parties                                       | The <i>Employer</i> is <b>Eskom Holdings SOC Ltd</b><br><br>The Eskom <i>Representative</i> is:<br>Name: Mashite Mabilo<br>Tel: 011 800 4246<br>E-mail: <a href="mailto:mabilomt@eskom.co.za">mabilomt@eskom.co.za</a>        |
| 1.3 Enquiry documents                             | The Invitation to tender reference number is MWP2350TX.   |
| 1.4 Type of Invitation to Tender/RFP              | This invitation to tender is:<br>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                              | Submit a tender only if the tenderer (whether a single company or a structure similar to a Joint Venture) complies with the eligibility criteria stated in the Tender Data and the tenderer, or any of his principals, is not |

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|  | <p>under any restriction to do business with Eskom/State Owned Companies.</p> <p>Tenderers are deemed ineligible to submit a tender if.</p> <ol style="list-style-type: none"> <li>1. Tenderers have the nationality of a country on any international sanctions list. A tenderer shall be deemed to have the nationality of a country if the tenderer is a national or is constituted, incorporated, or registered and operates in conformity with the provisions of the laws of that country. This criterion shall also apply to the determination of the nationality of proposed subcontractors or suppliers for any part of the Contract including related services.</li> <li>2. Tenderers submit more than one [tender/proposal] either individually or as a partner in a joint venture (JV) or consortium.</li> <li>3. [Tenders/proposals] submitted by a JV or consortium where the JV/consortium agreement does not explicitly state that the parties of the JV or consortium shall be jointly and severally liable for the execution of the Contract in accordance with the Contract terms.</li> <li>4. A Tenderer must not have a conflict of interest. All Tenderers found to have a conflict of interest shall be disqualified. A Tenderer may be considered to have a conflict of interest with one or more parties in this [tendering/RFP] process, if : <ol style="list-style-type: none"> <li>1. (a) they have a controlling partner/majority shareholder in common; or</li> <li>2. (b) they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another Tenderer, or influence the decisions of the Employer regarding this bidding process;</li> </ol> </li> <li>5. Tenders signed by non- authorized persons</li> <li>6. Where the tenderers are not registered on National Treasury's Central Supplier Database (except Foreign Suppliers)</li> <li>7. Any tenderer that is restricted by National Treasury</li> <li>8. Any tenderer on the Tender Defaulters list.</li> <li>9. A tenderer that sub-contracts 100% Scope of Work.</li> <li>10. Flagged suppliers.</li> </ol> <p><b>Ineligible tenderers will be disqualified.</b></p> <p><b>FLAGGING OF SUPPLIERS:</b></p> <p>Flagging of supplier is a process where a "flag" is placed on a supplier in respect of the following:</p> <ol style="list-style-type: none"> <li>a) Those suppliers implicated in serious misconduct by the Zondo Report or the SIU pending the finalization of supplier disciplinary measures against these suppliers; and</li> </ol> |
|--|---|

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|                             | <p>b) Other suppliers implicated in serious misconduct and a breach of the Eskom Supplier Integrity Pact by a forensic report or other source of credible information, such as the SAPS, the NPA, the SIU or other related source.</p> <ul style="list-style-type: none"> <li>The implications of this “flag” are as follows:</li> </ul> <p>No new contracts or extension of existing contracts may be awarded to the supplier pending finalization of supplier disciplinary processes against the supplier. As such, the supplier’s bid should be removed from any tender evaluation at the “eligibility” or “compliance” assessment stage of the evaluation.</p> |
| 2.2 -2.5 Tender Closing     | <p>The deadline for <b>Tender</b> submission is:<br/> Date <b>07 March 2024</b><br/> Time <b>10h00am</b></p> <p><b>Late Tenders will not be accepted.</b></p> <p>Tenders are to be submitted to the Eskom <i>tender box</i> at the following physical address:</p> <p><b>THE TENDER OFFICE</b><br/> <b>Eskom Megawatt Park - Tender office</b><br/> <b>North Side</b><br/> <b>Maxwell Drive</b><br/> <b>Sunninghill</b><br/> <b>2157</b></p>   |
| 2.9 Copy of original tender | <p><b>TWO ENVELOPE SYSTEM</b></p> <p>The Two Envelope System will apply to this tender.</p> <p>Tenders are to be packaged and submitted as follows:</p> <p><b>ENVELOPE No.1</b></p> <p><b>ENVELOPE No1 must be sealed and must contain the following information as part of the tenderer’s offer:</b></p> <p>(a) Technical / Engineering file;<br/> (b) Electronic copy of the above files</p> <p><b>NB: The above sections in Envelope No.1 must not contain any prices or offer amounts.</b></p> <p><b>ENVELOPE No.2 must be sealed and must contain the following information as part of the tenderer’s offer:</b></p>  |

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|  | <p>(a) Completed NEC3 ECC</p> <p>(b) Offer Letter (cover letter)</p> <p>(c) Price Schedule (Bill of Quantities)</p> <p>(d) Financial statements and</p> <p>(e) Annexure F1 SBD 6.2 - Declaration Certificate For Local Production And Content For Designated Sectors</p> <p>(f) Annexure F2- _Local content Declaration-Summary Schedule (Annex C)</p> <p>(g) Annexure F3 - Imports Declaration-Supporting schedule to Annex C (Annex D)</p> <p>(h) Annexure F4 - Local Content Declaration-Supporting Schedule to Annex C (Annex E)</p> <p>(i) Safety, Health, Environmental and Quality (SHEQ)</p> <ul style="list-style-type: none"> <li>• Health and Safety file.</li> <li>• Environmental file</li> <li>• Quality file</li> </ul> <p>(j) Commercial file (Any commercial information)</p> <p>(k) Electronic copy of the above files</p> <p><b>NB: Pricing must not be mentioned anywhere except in Envelope No.2. Non-adherence to the above submission requirements will lead to disqualification.</b></p> <p>Each envelope submitted as per the above requirements, must be submitted as follows:</p> <ul style="list-style-type: none"> <li>• One (1) x complete original tender (in hard copy format), marked "ORIGINAL", plus</li> <li>• One (1) x complete identical copy of the original tender (in hard copy format), marked "COPY" plus</li> <li>• One (1) x complete identical copy of the original tender in electronic format (Memory stick/flash disk) at tender submission deadline.</li> </ul> <p><b>The two envelopes submitted as per the above requirements must be separated and clearly marked as <u>Envelope No.1</u> and <u>Envelope No.2</u>.</b></p> <p>Both envelopes must bear the name and the address of the tendering entity.</p> <p>If all envelopes are not sealed and marked as required, the Employer will assume no responsibility for the misplacement or premature opening of the tender document.</p> <p>Failure on the part of the supplier to submit in electronic format for purposes of evaluation by the tender closing will not result in disqualification.</p> |
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|  | <p><b>N.B: Where a Tenderer does not submit 1 hard copy of the original tender at tender submission deadline, the tenderer will be disqualified.</b></p>   |
| 2.13 Tender Validity Period                | <p>The tender validity period is <b>12</b> weeks</p> <p><b>Note:</b><br/>While a twelve (12) week tender validity period has been provided from the tender closing date, the evaluation and adjudication process may take up to nine (9) months.</p> <p>Should the evaluation extend beyond the twelve (12) weeks, Tenderers will be requested to extend their validity beyond the twelve (12) weeks.</p>  |
| 2.16 Site/clarification meetings           | Not applicable   |
| 2.17 Clarification on enquiry documents    | The tenderer will notify the <i>Employer</i> of any clarifications required before the closing time for clarification queries, which is <b>05</b> working days before the deadline for tender submission.  |
| 2.23 Alternative tenders                   | Alternative tenders are <b>not allowed</b> .   |
| 2.31 Provision of security for performance | <p>Security for performance is required. Where a performance bond is proposed by the tenderer as the form of security for the contract, the names of two financial institutions that the tenderer will approach for the performance bond must be submitted with the tender.</p> <p>These financial institutions must be selected from the list of Eskom`s acceptable financial /pre-vetted guarantors issued with this tender.</p>   |
| 3.4 Opening of tenders                     | <p>Tenders will be opened at the same date and time as the tender deadline.</p> <p><b>Tenders will be opened on:</b><br/> <b>Date: 07 March 2024</b><br/> <b>Place: Megawatt Park</b><br/> <b>Time: 10h00 SAST</b></p> <p>Only Envelope No.1 will be opened at tender closing to read out the names of the companies that have tendered.</p> <p>Envelope No.2 will remain unopened at the Tender Office until the evaluations on Envelope No.1 are completed.</p> <p>Envelope No.2 will only be opened for the tenderers that have been qualified from the evaluation of the contents in Envelope No.1 in compliance with the tender evaluation criteria and requirements.</p> |
| 3.5 Prices to be read out                  | Prices will only be read out to the tenderers that have passed the evaluations of Envelope No.1.   |

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|                                   | <p>The tenderers that have passed Envelope No.1 stage will be notified of the date and time of the reading of the prices by the Eskom Representative.</p>  |                                    |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |
|-----------------------------------|--|------------------------------------|------|-------------|---|-------------------------------|------------------------------------|---|-------------------|------------------------------------|---|---|------------------------------------|
| 3.9 Basic Compliance              | <p>Basic compliance for this invitation to tender/ RFP are:</p> <ol style="list-style-type: none"> <li>1. Meet the eligibility criteria for a tenderer</li> <li>2. Submit one (1) hard copy of the original tender to Eskom in terms of the Two Envelope System.</li> <li>3. Submit a complete copy of the original tender in terms of the Two Envelope System.</li> <li>4. Submission of the mandatory commercial tender returnables as at stipulated deadlines.</li> <li>5. Central Supplier Database (CSD) number (MAA.....)</li> </ol> <p><b>Failing to comply with the above requirements will result in disqualification.</b></p>  |                                    |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |
| 3.10 Mandatory tender returnables | <p>A tenderer that does not submit mandatory documents/information required in mandatory documents by the required deadlines as stipulated in the Tender Returnable section of the respective Invitation to Tender; will be deemed non-responsive.</p> <ol style="list-style-type: none"> <li>1) Suppliers must have a CIDB grading of 8CE/EP or higher.</li> <li>2) Local Content Declaration Form.</li> <li>3) Suppliers must be registered on National Treasury's Central Supplier Database (CSD).</li> </ol> <p>Failure to submit hard copy of the original will lead to disqualification.</p>   |                                    |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |
| 3.13 Functionality requirements   | <p>Functionality requirements <b>are applicable.</b></p> <p>The following criteria will be applicable for this transaction under functionality criteria:</p> <p><b>Desktop Documentation Evaluation: Qualitative Criteria</b></p> <table border="1"> <thead> <tr> <th>Item No.</th> <th>Item</th> <th>Requirement</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Engineering design capability</td> <td>Compliant to Discipline Evaluation</td> </tr> <tr> <td>2</td> <td>PTMC Requirements</td> <td>Compliant to Discipline Evaluation</td> </tr> <tr> <td>3</td> <td>Substation HV Equipment as per approved products / design</td> <td>Compliant to Discipline Evaluation</td> </tr> </tbody> </table> | Item No.                           | Item | Requirement | 1 | Engineering design capability | Compliant to Discipline Evaluation | 2 | PTMC Requirements | Compliant to Discipline Evaluation | 3 | Substation HV Equipment as per approved products / design | Compliant to Discipline Evaluation |
| Item No.                          | Item   | Requirement                        |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |
| 1                                 | Engineering design capability  | Compliant to Discipline Evaluation |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |
| 2                                 | PTMC Requirements  | Compliant to Discipline Evaluation |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |
| 3                                 | Substation HV Equipment as per approved products / design  | Compliant to Discipline Evaluation |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |

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|  | 4   | Substation Engineering Requirements  | Compliant to Discipline Evaluation |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
|--|---|--|------------------------------------|------------------------------------|---------------------------------|---|----|---|---|---|---|---|---|---|---|---|---|---|---|
|  | 5   | 500 MVA 400/132/22kV transformer and Auxiliary transformer as per approved products / design | Compliant to Discipline Evaluation |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
|  | 6   | Project and construction management capability   | Compliant to Discipline Evaluation |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| <p>The minimum weighted average required for the tender to be considered technically acceptable is 75%.</p> <p><b>Tenderers who do not meet the threshold for functionality scoring will be disqualified and not be evaluated further.</b></p> |   |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 3.15 Evaluation of price   | <p>Prices will be evaluated as follows:</p> <ul style="list-style-type: none"> <li>Inclusive of VAT</li> <li>Making the specified correction for arithmetical errors</li> <li>Excluding contingencies in any bill of quantities or activity schedule.</li> <li>Making an appropriate adjustment for any other acceptable variations, deviations, or alternative tenders submitted.</li> <li>Making a comparison of the Net Present Value of each adjusted tender based on the tendered programme (if provided) and prices, on the estimated effect of Price Adjustment Factors and rate of exchange fluctuations (if applicable) and on other evaluation parameters relating to uncertainty and risk, where applicable.</li> <li>Unconditional discounts must be taken into account for evaluation purposes;</li> <li>Conditional discounts must not be taken into account for evaluation purposes but should be implemented when payment is effected.</li> <li>Prices will be scored out of 90 points</li> </ul> |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 3.17 Evaluation of Specific Goals  | <p>Specific goals/preference points will be scored out of 10 points in accordance with Eskom Procurement and Supply Chain Management Procedure.</p> <p>The following specific goals score card applies:</p> <table border="1"> <thead> <tr> <th>B-BBEE Status Level of Contributor</th> <th>Number of points (90/10 system)</th> </tr> </thead> <tbody> <tr><td>1</td><td>10</td></tr> <tr><td>2</td><td>9</td></tr> <tr><td>3</td><td>6</td></tr> <tr><td>4</td><td>5</td></tr> <tr><td>5</td><td>4</td></tr> <tr><td>6</td><td>3</td></tr> <tr><td>7</td><td>2</td></tr> </tbody> </table>  |  |                                    | B-BBEE Status Level of Contributor | Number of points (90/10 system) | 1 | 10 | 2 | 9 | 3 | 6 | 4 | 5 | 5 | 4 | 6 | 3 | 7 | 2 |
| B-BBEE Status Level of Contributor   | Number of points (90/10 system)   |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 1  | 10  |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 2  | 9   |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 3  | 6   |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 4  | 5   |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 5  | 4   |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 6  | 3   |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |
| 7  | 2   |  |                                    |                                    |                                 |   |    |   |   |   |   |   |   |   |   |   |   |   |   |

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|                         |   |   |   |               |   |
|-------------------------|---|---|---|---------------|---|
|                         | <table border="1"> <tr> <td>8</td> <td>1</td> </tr> <tr> <td>Non Compliant</td> <td>0</td> </tr> </table> <p>To claim preference points as specific goals/preference points, a tenderer must submit the following documentation:</p> <ul style="list-style-type: none"> <li>Valid B-BBEE certificate issued by a B-BBEE verification professional/ an affidavit/ CIPC affidavit.</li> <li>Proof of ownership/ shareholding (preferably CIPC documentation) inclusive of shareholding breakdown,</li> <li>Certified ID copies of shareholder(s)</li> <li>Proof of Disability (where applicable).</li> </ul> <p>A tenderer failing to provide documentation for the allocation of preference points will not be disqualified, but-</p> <p>a) may only score points out of 90 for price<br/> b) scores 0 points out of 10 for specific goals.</p> <p>A tenderer may not be awarded points for specific goals/preference points if the tender documents indicate that the tenderer intends to subcontract more than 25% of the value of the contract to any other person not qualifying for at least the points that the tenderer qualifies for, unless the intended subcontractor is an EME that can execute the subcontract.</p> <p><b>NOTE:</b><br/> <b>Failure on the part of a 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). The tenderer will, however, be scored zero on B-BBEE for purposes of PPPFA scoring and ranking.</b></p> | 8 | 1 | Non Compliant | 0 |
| 8                       | 1   |   |   |               |   |
| Non Compliant           | 0   |   |   |               |   |
| 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> <p>90/10 price and preference will apply</p> <p>Eskom will then add the score from Pricing and Specific goals together and rank the suppliers from the highest to the lowest.</p> <p><b>Please note: -</b><br/> <b>Eskom reserves the right to award to a tenderer who may not be the highest scoring/highest ranked tenderer, in line with Section (2) (1) (f) of the PPPFA.</b></p>  |   |   |               |   |
| 3.19 Objective Criteria | Objective criteria is applicable.   |   |   |               |   |

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|--|---|
|  | <p><b>SDL&amp;I obligation \</b></p> <p>The following objective criteria apply:</p> <p>Designated products:<br/> Transformer – Class 3B – 80%<br/> Cement – 100%<br/> Cables – 90%<br/> Steel – 100%</p> <p>Tenderers will have to seek dtic exemption should they wish to be exempted from any of the above designated materials.</p> <ul style="list-style-type: none"> <li>• Valid B-BBEE certificate issued by an authorized body or person; a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; any other requirement prescribed in terms of the Broad-Based Black Economic</li> <li>• CIDB Contract Participation Goal (CPG) is applicable.</li> <li>• CIDB Contract skills development goals (CSGD) are applicable.</li> </ul> <p>Contractor shall achieve in the performance of the contract the CSDG established in the CIDB Standard for Developing Skills through Infrastructure contracts (published in GGN 36760 of March 2020) CSDG is applicable to all classes of works exceeding R60 M and where the contract duration is 12 months or more or to Professional Services/Service contract/order where the estimated contract exceeds R5M and where the contract duration is 12 months or more.</p> <p><b>NIPP</b></p> <p>In line with DTI requirements on important content that are above \$5million, the National Industrial Participation Programme has to be applied in order to stimulate local manufacturing capability and job creation. International manufactures have to commit on minimum thirty percent local participation programme through formalized DTI NIPP obligations agreements. Therefore, in line with NIPP requirements, once the contract is awarded, the international company has to complete SBD 5 form asan undertaking to DTI.</p> <p>Note: The above NIPP obligation will apply only if the foreign portion is equivalent or more than the stipulatedminimum threshold of \$5 million. Suppliers will be encouraged to indicate or declare how much local manufacturing / procurement spend amounts to in thistransaction. In an event where the foreign content doesnot exceed the NIPP threshold of \$5 million, the normalSDL&amp;I targets of skills development, Subcontracting</p> |
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|                           | <p>and job creation will be applied.</p> <p><b>Please note:-</b></p> <ol style="list-style-type: none"> <li><b>Eskom reserves the right to award to a tenderer who may not be the highest scoring/highest ranked tenderer, in line with Section (2) (1) (f) of the PPPFA</b></li> <li><b>Functionality and elements of Contractual requirements must not be used as objective criteria.</b></li> </ol>  |          |              |                           |   |          |   |           |   |             |   |
|---------------------------|---|----------|--------------|---------------------------|---|----------|---|-----------|---|-------------|---|
| Contractual Requirements  | <p>Contractual Requirements may include the following:</p> <p>Objective Criteria:</p> <p>Designated products:<br/>Transformer – Class 3B – 80%<br/>Cement – 100%<br/>Cables – 90%<br/>Steel – 100%</p> <p>Tenderers will have to seek dtic exemption should they wish to be exempted from any of the above designated materials.</p> <ol style="list-style-type: none"> <li>SDL&amp;I requirements: <ol style="list-style-type: none"> <li>CIDB Skills Development Continuation of Mandatory Requirements for Contract Award:</li> </ol> </li> </ol> <table border="1"> <thead> <tr> <th>Criteria</th> <th>Eskom Target</th> </tr> </thead> <tbody> <tr> <td>Health and safety officer</td> <td>2</td> </tr> <tr> <td>Artisans</td> <td>4</td> </tr> <tr> <td>Engineers</td> <td>2</td> </tr> <tr> <td>Technicians</td> <td>2</td> </tr> </tbody> </table> <p>Tenderers who complete and submit the undertaking as required, but who do not meet Eskom’s targets, will not be disqualified. SDL&amp;I undertakings do not form part of scoring but commitments will form part of contractual obligations</p> <p><b>BBBEE requirements:</b></p> <p>All tenderers must at a minimum maintain their BBBEE status throughout the contract period.</p> <p><b>Jobs.</b></p> <p>Tenderers are required to submit proposals for the type and number of jobs that will be created and retained in South Africa as a direct result of being awarded a contract.</p> | Criteria | Eskom Target | Health and safety officer | 2 | Artisans | 4 | Engineers | 2 | Technicians | 2 |
| Criteria                  | Eskom Target  |          |              |                           |   |          |   |           |   |             |   |
| Health and safety officer | 2   |          |              |                           |   |          |   |           |   |             |   |
| Artisans                  | 4   |          |              |                           |   |          |   |           |   |             |   |
| Engineers                 | 2   |          |              |                           |   |          |   |           |   |             |   |
| Technicians               | 2   |          |              |                           |   |          |   |           |   |             |   |

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|  | <p>a) must apply subcontracting to previously designated groups.</p> <p>b) must advertise the tender with a specific condition for contract award that the successful tenderer must subcontract a minimum of 30% of the value of the contract to one or more of the following:</p> <ol style="list-style-type: none"> <li>i. An EME or QSE which is at least 51% owned by black people.</li> <li>ii. An EME or QSE which is at least 51% owned by black people who are youth.</li> <li>iii. An EME or QSE which is at least 51% owned by black people who are women.</li> <li>iv. An EME or QSE which is at least 51% owned by black people with Disabilities.</li> <li>v. An EME or QSE which is 51% owned by black people living in rural or underdeveloped areas or townships.</li> <li>vi. A cooperative which is at least 51% owned by black people.</li> <li>vii. An EME or QSE which is at least 51% owned by black people who are military veterans;</li> </ol> <p>Tender Returnable if the above element is a requirement;</p> <ul style="list-style-type: none"> <li>• Proof of a sub-contract agreement/s must be submitted.</li> <li>• CSD report of subcontractors</li> <li>• Sub-contractor/s B-BBEE certificate / sworn affidavit must be submitted.</li> </ul> <p>Subcontracting, in this instance, will be treated as a condition for contract award. A supplier awarded a contract may not subcontract more than 25% of the value of the contract to any other entity that does not have an equal or higher B-BBEE status level of a contributor than the supplier concerned unless the contract is subcontracted to an EME that has the capability and ability to execute the subcontract.</p> <p>As security for the fulfilment of all SDL&amp;I obligations, Eskom will apply a penalty of 2.5% of every invoice amount (excluding VAT) for failure to submit SDL&amp;I performance reports every quarter; or failure to meet the SDL&amp;I obligations in a contract.</p> <p><b>Please Note:</b><br/> <b>Contractual requirements are not evaluation criteria. They are required to be met and assessed after the evaluation and ranking of the tenders. Proof that the highest ranked tenderer/ tenderer recommended for award (on the basis of objective criteria) is able to meet the contractual requirements, must be submitted prior to contract award.</b></p> |
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|   | <p><b>Failure to meet “Contractual Requirements “by the stipulated deadlines; may result in the tenderer being regarded as non-responsive and ineligible for contract award.</b></p>  |
| 2.25 Contractual Condition  | <p>The conditions of contract will be the <b>NEC</b></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> <p>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>   |
| CIDB Requirements (where applicable for Engineering and Construction Works Contracts) | <p>CIDB Requirements are applicable.</p> <p>1. It is estimated that tenderers must have a Construction Industry Development Board (CIDB) contractor grading of. 8CE/EP</p> <p style="text-align: center;">OR;</p> <p>Only those tenderers who are registered with the cidb, or are capable of being so prior to the evaluation of submissions, in a contractor grading designation equal to or higher than a contractor grading designation determined in accordance with the sum tendered, or a value determined in accordance with Regulation 25 (1B) or 25(7A) of the Construction Industry Development Regulations, for a Civil Or Electrical engineering.*. class of construction work, are eligible to have their tenders evaluated. Joint ventures are eligible to submit tenders provided that:</p> <p>2. Joint ventures are eligible to submit tenders provided that:-</p> <ol style="list-style-type: none"> <li>1. every member of the Joint venture (JV) is registered with the CIDB;</li> <li>2. the lead partner has a contractor grading designation in the). Civil or Electrical engineering*class of construction work; or not lower than one level below the required grading designation in the class</li> </ol> |

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|  | <p>of works construction works under consideration and possesses the required recognition status.</p> <p>3. the combined contactor grading designation calculated in accordance with the cidb regulations is equal to 9CE/9EP contractor grading designation determined in accordance with the sum tendered for Civil and or electrical engineering *class of construction work or a value determined in accordance with Regulations 25 (1B) or 25 (7A) of the CIDB Regulations</p> <p><b>Please note:</b><br/> <b><i>That only those tenderers who are registered with the Construction Industry Development Board or are capable of being so registered within twenty-one (21) working days from the closing date for submission of tenders in a contractor grading designation as stipulated in the tender data and determined in accordance with the best estimated value of the scope of works herein are eligible to submit tenders.</i></b></p> |
|--|--|

**Please note:**

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

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

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

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

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

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


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

- (a) the B-BBEE status level certificate issued by an authorised body or person; or
- (b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or
- (c) any other requirement prescribed in terms of the Broad-Based Black Economic

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## Empowerment Act

### 1.3 TENDER RETURNABLES

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

#### NOTE:

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

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

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

| Reference               | Returnable From Suppliers   | Returnable required at Tender closing (disqualifiable)* | Returnable required at Tender closing. (Non-disqualifiable) ** | Returnable required prior to Contract Award. |
|-------------------------|---|---|--|--|
| <b>Basic Compliance</b> | One (1) original and (1) copy of the original tender (hardcopies)<br>Two envelope system will apply | ✓   |  |  |
| <b>Annexure A</b>       | Acknowledgement Form  |   | ✓  |  |

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|   |  |   |   |     |
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| <b>Annexure B</b>   | Tenderers Particulars  |   | ✓ |     |
| <b>Annexure C</b>   | Integrity Pact Declaration form  |   | ✓ |     |
| <b>Annexure D</b>   | CPA for local goods/services (if applicable)   |   | ✓ |     |
| <b>Annexure E</b>   | CPA(IG) for imported goods/services (if applicable)  |   | ✓ |     |
| <b>Annexure F1-F4</b>   | SBD 6.2 -Declaration certificate for local production and content and Annexures C, D, E  |   |   | ✓   |
| <b>Annexure G</b><br>(applicable for all suppliers including Foreign suppliers) | SBD 1- to be completed and submitted by all tenderers.   |   |   | ✓   |
| <b># Annexure H</b>   | SBD 6.1- Preference Points Claim Form in terms of PPPFA 2022 regulations   |   | ✓ |     |
| <b>Annexure I</b>   | SBD 4 – Bidders Disclosure   |   | ✓ |     |
| Reverse e-auction training acknowledgement form                                 |  |   |   | N/A |
| <b>Additional Documents required in event of JV:-</b>                           | Letter of intent to form a JV/consortium or Valid joint venture agreement confirming the rights and obligations of each of the joint venture partners and their profit-sharing ratios.   |   | ✓ |     |
|   | Separate written confirmation that the joint venture will operate as a single business entity (incorporated) for the duration of the contract, or this may be included as an obligation within the JV agreement.   |   | ✓ |     |
|   | # proof of compliance to the stipulated Specific goals.  |   |   | ✓   |
|   | 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.   |   |   | ✓   |
| <b># Specific Goals</b>   | Failure on the part of the supplier to submit “ <b>proof of specific goals</b> ” for purposes of evaluation and scoring by the tender closing will not result in disqualification (if tenderer is otherwise deemed to be responsive/acceptable in all other aspects). The tenderer will, however, be scored zero for Specific goals for purposes of PPPFA scoring and ranking. | ✓ |   |     |
| <b>Supplier Development Localization &amp; Industrialization (SDL&amp;I)</b>    | Attached SDL&I Strategy / undertaking will apply.  |   |   | ✓   |
| <b>Tax Clearance Certificates</b>   | A certified copy of a tax clearance certificate is still required by Foreign suppliers (with a footprint in South Africa- but who are  |   |   | ✓   |

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|   |  |   |   |     |
|---|--|---|---|-----|
|   | <p>not on CSD and have not provided a SARS pin number) and Local suppliers (who have not provided their SARS e-filing PIN number for verification by Eskom and/or their CSD profile / CSD number).</p> <p>Foreign suppliers with no footprint in South Africa, must still complete the SBD1 document, however no proof of tax compliance is required.</p>                                  |   |   |     |
| <b>Tax Evaluation Questionnaire (if services contract and was included as annexure)</b>                     | <p>Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE</p>  |   |   | N/A |
| <b>Compliance with Employment Equity Act</b>  | <p>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)</p> |   |   | ✓   |
| <b>CIDB</b>   | <p>Valid proof of the required cidb grading designation for the main contractor; JV and /or sub-contractor as may be required in the tender data at tender closing deadline or within 21 working days from the closing date of submission of tenders if this is agreed with the Employer</p>   |   | ✓ |     |
| <b>NEC/FIDIC Documentation</b>  | <p>Completed NEC pricing schedule and contract data.<br/>Complete BOQ</p>  | ✓ |   |     |
| <b>Additional documents required (ECSA/ SACPCMP/CVs/ permits/licenses/ specific registration documents)</b> |  |   |   | ✓   |
|   | <b>DOCUMENTS REQUIRED UNDER CONTRACTUAL REQUIREMENTS (WHERE CONTRACTUAL REQUIREMENTS ARE STIPULATED)</b>   |   |   |     |
| <b>Safety</b>   | <p>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)</p>  |   |   | ✓   |
| <b>Quality</b>  | <p>Documents that may be required per scope of work</p>  |   |   | ✓   |
|   | <b>Other safety/quality documents as required per scope of works</b>   |   |   | ✓   |

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|   |  |  |   |   |
|---|--|--|---|---|
| <b>Environmental</b>                            | Documents that may be required as per scope of work  |  |   | ✓ |
| <b>Due Diligence</b>                            | Audited Financial Statements of the <i>tenderer</i> for the previous 18 months, or to the extent that such statements are not available, for the last year. Tenderers must note that in the case of a joint venture or special purpose vehicle (SPV) especially formed for this tender, audited financial statements for each participant in the JV / SPV is required. Start-up enterprises formed within the last 12 months are not required to send in statements, but if successful with their tender will be required to send statements for the first year when once available. Public Interest Score & ITA34C(Tax return) for the same accounting period as the annual financial statements (only applicable to South African Organizations that are not required to audited by Companies Act 71 of 2008)  |  |   | ✓ |
| <b>Security Service</b>                         | Eskom's standard for the security services specification and PSIRA requirements are provided within the tender documents.<br><br>Supplier to sign & submit a letter of intent confirming that they will comply with the Eskom Security standard requirements.  |  | ✓ |   |
| <b>Project Schedule</b>                         | The successful tenderer will be required to submit programme in accordance with NEC Core clause 31.2 Contractor's schedule integrity requirements practice notice 240-53207174 and NEC Works information clause 2.6.   |  |   | ✓ |
| <b>Project Stability Stakeholder Management</b> | <p><b>Stakeholder Management</b></p> <p>A signed copy of the company's stakeholder management guideline indicating the stakeholder responsibility accountability. The guideline should indicate how the contractor intends to collaborate with different stakeholders that include government department, municipalities, business organisations, community-based organisations, impacted project communities.</p> <p>The guideline to be in-line with the Eskom Stability Guideline.</p> <p>Samples of, or confirmation of how the contractor has or will do stakeholder management element that indicate Stakeholder Management Plan, Stakeholder matrix and Implementation Schedule and Stakeholder impact assessment tool</p> <p><b>Integration Structures</b></p> <p>Frameworks for platforms/ mechanisms to be used for the integration and cooperation of stakeholders (internally &amp; externally).</p> <p><b>Community Liaison</b></p> |  |   | ✓ |

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|  |   |  |  |  |
|--|---|--|--|--|
|  | <p>A signed copy of the Project Community Liaison protocol that is indicative of integration points with Eskom Project Stability Personnel</p> <p><b>Risk Management</b><br/>Methodology to identify reputational risk and analyse, mitigate and track such risks with a sample risk analysis and progress reports. This to reflect methodology for project issue and incident management.</p> <p><b>Communication Protocol</b><br/>A signed copy of the Project Communication Protocol reflective of employee communication, stakeholder communication, Media Management, Spokesperson guidelines and Project Branding Protocols that include project signage, uniforms and vehicles</p> <p>Project closeout strategy for external stakeholders</p> <p><b>Labour Management:</b><br/>A signed copy of Employers Policies or Procedures for employee recruitment &amp; demobilisation reflecting, Termination of Contract and Removal from Site, Use of Temporary Employment Services, Employment Bargaining council used and alignments process of employee rates with subcontractors within a site.</p> <p><b>Employee Recruitment</b><br/>A signed copy of Project Resource Plan indicative of the number of personnel to be used for the project as well as a Pro Forma of Limited Duration Contract to be signed.</p> <p>This should be specific on employee categorisation that reflects, Core, Skilled, Semi-skilled and unskilled personnel.</p> <p>Contractor Project Recruitment procedure (inclusive of employee mobilisation plan, Contractor in-house recruitment procedure &amp; End of work procedure should include employee bargaining process or bargaining council used by the contractor.</p> <p><b>Employee Induction</b><br/>Contractor Induction Program, which includes project stability as a focus area.</p> <p>Contractor Industrial Relations Policies, Procedures and Standards. This should include the Industrial Action Management Procedure Methodology to proactively identify risks to Project Labour Stability.</p> |  |  |  |
|--|---|--|--|--|

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|  | Description of the Operating Procedures for the Employee Engagement Forum the Contract Plans to implement manage communication flow between management and employees. |  |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |
|--|---|--|----------|------|-------------|---|-------------------------------|------------------------------------|---|-------------------|------------------------------------|---|---|------------------------------------|---|-------------------------------------|------------------------------------|---|---|------------------------------------|---|--|------------------------------------|---|--|--|
|  | <b>DOCUMENTS REQUIRED UNDER FUNCTIONALITY/TECHINICAL CRITERIA</b>   |  |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |
| Technical (required functionality scoring) | for   | <p>The following criteria will be applicable for this transaction under functionality criteria:</p> <table border="1"> <thead> <tr> <th>Item No.</th> <th>Item</th> <th>Requirement</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Engineering design capability</td> <td>Compliant to Discipline Evaluation</td> </tr> <tr> <td>2</td> <td>PTMC Requirements</td> <td>Compliant to Discipline Evaluation</td> </tr> <tr> <td>3</td> <td>Substation HV Equipment as per approved products / design</td> <td>Compliant to Discipline Evaluation</td> </tr> <tr> <td>4</td> <td>Substation Engineering Requirements</td> <td>Compliant to Discipline Evaluation</td> </tr> <tr> <td>5</td> <td><b>500 MVA 400/132/22kV</b> transformer and Auxillary transformer as per approved products / design</td> <td>Compliant to Discipline Evaluation</td> </tr> <tr> <td>6</td> <td>Project and construction management capability</td> <td>Compliant to Discipline Evaluation</td> </tr> </tbody> </table> <p>A Minimum score of 75% is required on functionality for the supplier to be scored further.</p> | Item No. | Item | Requirement | 1 | Engineering design capability | Compliant to Discipline Evaluation | 2 | PTMC Requirements | Compliant to Discipline Evaluation | 3 | Substation HV Equipment as per approved products / design | Compliant to Discipline Evaluation | 4 | Substation Engineering Requirements | Compliant to Discipline Evaluation | 5 | <b>500 MVA 400/132/22kV</b> transformer and Auxillary transformer as per approved products / design | Compliant to Discipline Evaluation | 6 | Project and construction management capability | Compliant to Discipline Evaluation | ✓ |  |  |
| Item No.                                   | Item  | Requirement  |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |
| 1  | Engineering design capability   | Compliant to Discipline Evaluation   |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |
| 2  | PTMC Requirements   | Compliant to Discipline Evaluation   |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |
| 3  | Substation HV Equipment as per approved products / design   | Compliant to Discipline Evaluation   |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |
| 4  | Substation Engineering Requirements   | Compliant to Discipline Evaluation   |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |
| 5  | <b>500 MVA 400/132/22kV</b> transformer and Auxillary transformer as per approved products / design   | Compliant to Discipline Evaluation   |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |
| 6  | Project and construction management capability  | Compliant to Discipline Evaluation   |          |      |             |   |                               |                                    |   |                   |                                    |   |   |                                    |   |                                     |                                    |   |   |                                    |   |  |                                    |   |  |  |

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**ANNEXURE A**

**ACKNOWLEDGEMENT FORM**

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

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |

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

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

Or: Incorrect or incomplete for the following reasons:

---



---



---

**Cataloguing Acknowledgement:**

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

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

---



---



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

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

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

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

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


Contact details of contact person:

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

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## **ANNEXURE B**

### **TENDERER'S PARTICULARS**

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

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

Please complete the following:

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

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 |  |

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|   |  |
|---|--|
| Proposed Scope of work to be done by sub-contractor |  |
| Contact person                                      |  |
| Telephone number                                    |  |
| Fax number  |  |
| E-mail address                                      |  |
| Postal address                                      |  |
| Physical address                                    |  |

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

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

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

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

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

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

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

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

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

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

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

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

### 1. Single tenderers

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

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

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

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

## 2. Joint Ventures

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


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

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

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## ANNEXURE C

### INTEGRITY DECLARATION FORM

#### **DECLARATION OF INTEREST**

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

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

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

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

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

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

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

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

## 2. DECLARATION OF FAIR TENDERING PRACTICES

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

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

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

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

| Item  | Question  | Yes | No |
|-------|---|-----|----|
| 1.1   | <p>Is the <i>tenderer/s (or any of its directors/members/shareholders)</i> listed on National Treasury's Database of Restricted Suppliers as companies/persons prohibited from doing business with the public sector</p> <p><b>[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].</b></p> <p>The Database of Restricted Suppliers can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>).</p> |     |    |
| 1.2   | <p>Is the <i>tenderer/s (or any of its directors / members / shareholders)?</i> listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combatting of Corrupt Activities Act (No 12 of 2004)</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>).</p>   |     |    |
| 1.3   | <p>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?</p>   |     |    |
| 1.3.1 | Provide details.  |     |    |
| 1.4   | <p>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</p>  |     |    |
| 1.5   | <p>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?</p>   |     |    |

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### 3. DECLARATION OF SHAREHOLDING INFORMATION

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

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

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

#### Individuals:

| Full Name | Identity Number | Shareholding Percentage |
|-----------|-----------------|-------------------------|
|           |                 |                         |
|           |                 |                         |
|           |                 |                         |
|           |                 |                         |
|           |                 |                         |
|           |                 |                         |

#### Other Entities\*:

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

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

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

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

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

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

**Joint Ventures**

I, the undersigned, \_\_\_\_\_ (full names) hereby confirm that acting in the capacity of lead partner, I am duly authorised to sign all documents in connection with the tender

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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.


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

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

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## **ANNEXURE D**

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

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

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

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

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

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

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

Tenderers shall comply with the following requirements:

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

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

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

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

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


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

Additional/Alternative Offers must be clearly indicated as such

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### 3. ESKOM'S PREFERRED INDEX LIST

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

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

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

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

### 3. NUMBER OF FORMULAE & INDICES

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

### 4. CPA FIXED PORTION

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

### 5. BASE DATE

1. In instances of indices or other references published monthly, the Base Date is to be:  
*The month before the month in which the Enquiry closes*
2. In instances where the reference figures, e.g. market prices, are published daily or at more intervals than once a month:  
*The average for the month before the month in which the Enquiry closes*
1. In this case, the following shall apply:

1. Where the average is published:

*The average published price in the currency Eskom will be exposed to. e.g. The currency in which Eskom will effect payment*

2. Where a high, low and mean are published:

*The mean*

3. Where other prices than the Cash Settlement or Cash Sellers Price are published:

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*The Cash Settlement or Cash Sellers Price*

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

**3. CPA FOR PROFESSIONAL SERVICES**

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

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


No fixed portion is mandatory.

|          |       |          |       |
|----------|-------|----------|-------|
| Signed   | _____ | Date     | _____ |
| Name     | _____ | Position | _____ |
| Tenderer | _____ |          |       |

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

| Labour  | Commodities   | Processed material   | Transport                      | Others  |
|---|---|--|--------------------------------|---|
| <b>Labour general (hourly paid)</b><br>SEIFSA, C3, actual labour cost   | <b>Steel</b><br>StatsSA, P0142.1<br>Table 2, basic iron and steel | <b>Mechanical engineering material</b><br>SEIFSA, G, mechanical engineering material       | SEIFSA, L2, road freight costs | StasSA, PO141 <b>CPI</b> (Headline) all items OR<br>SEIFSA, D-2 (CPI)   |
|   | <b>Copper</b><br>SEIFSA, F, copper metric ton                     | <b>Electrical engineering material</b><br>SEIFSA, G-1, electrical engineering material     |                                |   |
| <b>Labour general</b><br>SEIFSA, C3 (a), actual labour cost (field force) where subsistence allowance is paid | <b>Aluminium</b><br>SEIFSA, R, aluminium                          | <b>Building and construction material</b><br>SEIFSA, G, building and construction material |                                | StasSA, PO142.1), <b>PPI</b><br>4. Final Manufacture d Goods<br><br>Or<br>5. Intermediate Manufacture d Goods OR<br>6. SEIFSA Table U Producer Price Index (PPI)<br>- final manufactured GOODS OR Intermediate Manufactured Goods |
|   | <b>Zinc</b><br>SEIFSA, F, zinc                                    |  |                                |   |
|   | <b>Lead</b><br>SEIFSA ,F, lead                                    |  |                                |   |

**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 | National Statistical Institute, Country-specific CPI (Headline) |

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|  |                |   |                      |  |
|--|----------------|---|----------------------|--|
|  | LME, Copper    | National Statistical Institute, Country-specific electrical engineering material    | transport cost index | National Statistical Institute, Country-specific PPI |
|  | LME, aluminium |   |                      |  |
|  | LME, zinc      | National Statistical Institute, Country-specific building and construction material |                      |  |
|  | LME, lead      |   |                      |  |

|  |
|--|
| Closing date of tender _____ / _____ / _____<br>TENDERER'S SIGNATURE _____ |
|--|

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**ANNEXURE E**

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

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

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

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

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

**PART 1: PAYMENT OF FOREIGN COMMITMENTS**

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

**Payment Method 1A:**

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

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

**Applicable (Y / N)**

**Payment Method 1B:**

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

Please note:

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

**Applicable(Y/N) or**

**Payment Method 2:**

In South African Rand at the selling spot rate of exchange obtained by Eskom’s Treasury on the date that the forward cover is cancelled. Eskom will notify the supplier of the date that the forward cover is cancelled as well as the intended payment date, which will be as per the agreed payment terms.

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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:

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

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

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

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

Fixed ZAR pricing

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

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

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

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

**PART 2: EXCHANGE RATES**

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

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.

|                      |
|----------------------|
| <b>RATES/TARIFFS</b> |
|----------------------|

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

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

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

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

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

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

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

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

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


**2. EXPATRIATE LABOUR METHOD**

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

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

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

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

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

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


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

|  |
|--|
| Closing date of tender _____ / _____ / _____ |
| TENDERER'S SIGNATURE _____                   |

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## ANNEXURE F1

SBD 6.2

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

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

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

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

- 1.1. Dtic makes provision for the promotion of local production and content.
- 1.2. Dtic prescribes that in the case of designated sectors, organs of state must advertise such tenders with the specific bidding condition that only locally produced or manufactured goods, with a stipulated minimum threshold for local production and content will be considered.
- 1.3. A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 1.4. The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286: 2011 as follows:

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

Where

x is the imported content in Rand

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

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

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

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

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

| Sector                            | Stipulated threshold |
|-----------------------------------|----------------------|
| 1. Steel                          | 100%                 |
| 2. Cable                          | 90%                  |
| 3. Cement                         | 100%                 |
| 4. Wire Products                  | 100%                 |
| 5. Transformers 500MVA (Class 3B) | 80%                  |
| <b>Total</b>                      | <b>100%</b>          |

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

(Tick applicable box)

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

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

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

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

| 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 dtic must be informed accordingly in order for the DTIC to verify and in consultation with the AO/AA provide directives in this regard.

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

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

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

**ISSUED BY:** (Eskom Holdings SOC Limited):

.....  
 NB

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

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

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

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|  |   |
|--|---|
| 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.**

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

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_  
**WITNESS No. 1** \_\_\_\_\_ **DATE:** \_\_\_\_\_  
**WITNESS No. 2** \_\_\_\_\_ **DATE:** \_\_\_\_\_

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



Adobe Acrobat Document

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



Adobe Acrobat Document

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



Adobe Acrobat Document

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**ANNEXURE G**

**SBD 1**

**PART A  
INVITATION TO BID**

|  |   |  |                                     |   |      |
|--|---|--|-------------------------------------|---|------|
| <b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>   |   |  |                                     |   |      |
| BID NUMBER:  |   | CLOSING DATE:  |                                     | CLOSING TIME:   | 10AM |
| DESCRIPTION  | number  |  |                                     |   |      |
| <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>  |   |  |                                     |   |      |
| BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)  |   |  |                                     |   |      |
| Eskom Megawatt Park - Tender office  |   |  |                                     |   |      |
| North Side   |   |  |                                     |   |      |
| Maxwell Drive  |   |  |                                     |   |      |
| Sunninghill 2157   |   |  |                                     |   |      |
| <b>SUPPLIER INFORMATION</b>  |   |  |                                     |   |      |
| NAME OF BIDDER   |   |  |                                     |   |      |
| POSTAL ADDRESS   |   |  |                                     |   |      |
| STREET ADDRESS   |   |  |                                     |   |      |
| TELEPHONE NUMBER   | CODE  |  | NUMBER                              |   |      |
| CELLPHONE NUMBER   |   |  |                                     |   |      |
| FACSIMILE NUMBER   | CODE  |  | NUMBER                              |   |      |
| E-MAIL ADDRESS   |   |  |                                     |   |      |
| VAT REGISTRATION NUMBER  |   |  |                                     |   |      |
|  | TCS PIN:  |  | <b>OR</b>                           | CSD No:   |      |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]   | <input type="checkbox"/> Yes<br><input type="checkbox"/> No |  | B-BBEE STATUS LEVEL SWORN AFFIDAVIT | <input type="checkbox"/> Yes<br><input type="checkbox"/> No |      |
| IF YES, WHO WAS THE CERTIFICATE ISSUED BY?   |   |  |                                     |   |      |
| AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX   | <input type="checkbox"/>                                    | AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)           |                                     |   |      |
|  | <input type="checkbox"/>                                    | A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS) |                                     |   |      |
|  | <input type="checkbox"/>                                    | A REGISTERED AUDITOR   |                                     |   |      |
|  |   | NAME:  |                                     |   |      |
| <b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs&amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b> |   |  |                                     |   |      |

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

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## PART B TERMS AND CONDITIONS FOR BIDDING

|  |   |
|--|---|
| <b>BID SUBMISSION:</b>   |   |
| 1.   | BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.   |
| 2.   | ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR ONLINE  |
| 3.   | BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION. |
| 4.   | WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.                               |
| 5.   | THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.   |
| <b>TAX COMPLIANCE REQUIREMENTS</b>   |   |
| 1.   | BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.  |
| 2.   | BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.   |
| 3.   | APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.  |
| 4.   | BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.  |
| 5.   | IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.   |
| 6.   | WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.   |
| <b>QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>  |   |
| 1.   | IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>   |
| 2.   | DOES THE BIDDER HAVE A BRANCH IN THE RSA? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>   |
| 3.   | DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>  |
| 4.   | DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <span style="float: right;"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>   |
| <b>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.</b> |   |

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

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**ANNEXURE H**

**SBD 6.1**

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

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

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

**1. GENERAL CONDITIONS**

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

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

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

1. The applicable preference point system for this tender is the 90/10 preference point system.
2. The applicable preference point system for this tender is the 80/20 preference point system.
3. Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.
  1. Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
    1. Price; and
    2. Specific Goals.


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

The maximum points for this tender are allocated as follows:

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|  | <b>POINTS</b> |
|--|---------------|
| <b>PRICE</b>                                     |               |
| <b>SPECIFIC GOALS</b>                            |               |
| <b>Total points for Price and SPECIFIC GOALS</b> | <b>100</b>    |

2. Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

3. The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

### 3. DEFINITIONS

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

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

#### 1. POINTS AWARDED FOR PRICE

##### 3.1.1 THE 90/10 PREFERENCE POINT SYSTEMS

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

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90/10

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

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{min}$  = Price of lowest acceptable tender

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

### 1. POINTS AWARDED FOR PRICE

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

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

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{max}$  = Price of highest acceptable tender

### 7. POINTS AWARDED FOR SPECIFIC GOALS

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

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preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

- any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

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

**DECLARATION WITH REGARD TO COMPANY/FIRM**

- Name of company/firm.....
- Company registration number: .....

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3. TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

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

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

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

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

**DATE:** .....

**ADDRESS:** .....

.....

|   |   |                            |               |            |    |  |
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**Annexure I**

**SBD 4**

**BIDDER'S DISCLOSURE**

**1. PURPOSE OF THE FORM**

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

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

**2. Bidder's declaration**

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

employed by the state?

**YES/NO**

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

| Full Name | Identity Number | Name of State Institution |
|-----------|-----------------|---------------------------|
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |
|           |                 |                           |

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

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

2.2.1 If so, furnish particulars:

.....  
 .....

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

1. If so, furnish particulars:

.....  
 .....

**3. DECLARATION**

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

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

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

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

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

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

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

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