

	Invitation to Tender	Document Identifier	240-114238630	Rev	11
		Effective Date	18 February 2022		
		Review Date	February 2027		

ESKOM HOLDINGS SOC LTD

INVITATION TO TENDER


FOR

Supply and delivery of Raw water pre-treatment chemicals for portable water production at Matla Power Station on an as and when required basis for the period of 5 years

Tender number	MPMAT10409GX
Issue date	03 November 2022
Closing date and time	07 December 2022 at 10h00
Tender validity period	120 days from the closing date and time
Clarification meeting	<p>A Non-Compulsory Clarification Meeting will be held via MS Teams on the 14 November 2022.</p> <p>Time: 10AM</p> <p>See item 2.16 for more details</p>
Tenders are to be delivered to the following address on the stipulated closing date and time:	<p>THE PLACE FOR DELIVERY OF THE TENDER IS THE 24 HOUR ESKOM HOLDINGS SOC LIMITED'S TENDER BOX LOCATED AT:</p> <p>TENDER BOX, GROUND FLOOR NO. 10 SMUTS AVENUE WITBANK / EMALAHLENI MPUMALANGA GPS Co-ordinates: Latitude:25.87723S Longitude:29.21629E https://www.google.com/maps/search/-25.87367+29.21745/data=!4m4!2m3!3m1!2s-25.87367+29.21745!4b1</p> <p>Please note that Tender box for this Tender Submission is not located at Matla Power Station or any other Eskom premises except the one mentioned above.</p>

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Invitation to Tender/Request for Proposal

Eskom Holdings SOC Ltd (hereinafter "Eskom") invites you to submit a *tender* for the Supply and delivery of Raw water pre-treatment chemicals for portable water production at Matla Power Station on an a when required basis for the period of 5 years

The enquiry documents are supplied to you on the following basis

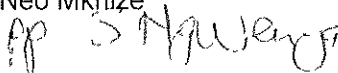
- Free of charge

Eskom has delegated the responsibility for this tender to the Eskom *Representative* whose name and contact details are set out in the Tender Data. A submission of a tender 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)

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

Yours faithfully


 Procurement Manager

Neo Mkhize


Date: 8 November 2022

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The following documents listed hereunder are attached to this enquiry

Number	Description	Annexure/to be downloaded and attached	Attached (Y/N/ N/A)
6 1	*Acknowledgement form	Annexure A	Y
6 2	*Tenderer's particulars	Annexure B	Y
6 3	*Integrity Declaration Form (refer to www.eskom.co.za for the Supplier Integrity Pact that suppliers are required to download and read)	Annexure C	Y
6 4	CPA Requirements for Local Goods/Services	Annexure D	Y
6 5	CPA(IG) for Foreign Goods/Services (if applicable)	Annexure E	Y
6 6	SBD 6 2- Declaration Certificate for Local Production and Local Content (only applicable if designated materials are included)	Annexure F1	N/A
	Annexure C-Local Content Declaration-Summary Schedule	Annexure F2	N/A
	Annexure D-Imported Content Declaration – Supporting Schedule to Annexure C	Annexure F3	N/A
	Annexure E-Local Content Declaration-Supporting Schedule to Annexure C	Annexure F4	N/A
6 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
6 8	SBD 6 1- Preference Points Claim Form in terms of PPPFA 2017 regulations	Annexure H	Y
6 9	SBD4 - Bidders Disclosure Form	Annexure I - Attached	Y
6 10	Authority to submit a tender	Annexure L - Attached	Y
6 11	Supplier Development & Localisation (SDL&I) Undertaking	Annexure K - Attached	Y
6 12	Tax Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE	Attached	Y
6 13	Reverse e-auction training acknowledgement form (if applicable)	N/A	N/A

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6 14	Reverse e-auction process (if applicable)	N/A	N/A
6 15	SHEQ Requirements	Attached	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**; then the tenderers are required to download this from www.eskom.co.za. The **"Tender Data"** as detailed herein shall take precedence over the **Standard Conditions of Tender** in the event of any ambiguity or inconsistency between the two documents.

Clause Number from Standard Conditions of Tender	Tender Data																		
1 1 Parties	<p>The <i>Employer</i> is Eskom Holdings SOC Ltd</p> <p>The Eskom <i>Representative</i> is Name Shiluva Nkuna Tel. 013 699 7166 E-mail <u>NkunaSY@eskom.co.za</u></p>																		
1 3 Enquiry documents	<p>The Invitation to tender number is MPMAT10409GX</p> <p>All Relevant documentation for this tender will be uploaded onto</p> <ul style="list-style-type: none">○ Eskom Tender Bulletin○ National Treasury E-Tender Portal <p>It is the responsibility of the tendering party to ensure all the required documentation is downloaded and completed and submitted as follows</p> <table><tr><td>SECTION 1 – Will comprise of the Commercial and SD&L Requirements</td><td>✓</td><td>✓</td></tr><tr><td>SECTION 2 – Will comprise of the Technical Requirements</td><td>✓</td><td>✓</td></tr><tr><td>SECTION 3 – Will comprise of the Safety Requirements</td><td>✓</td><td>✓</td></tr><tr><td>SECTION 4 - Will comprise of the Quality Requirements</td><td>✓</td><td>✓</td></tr><tr><td>SECTION 5 – Will comprise of the Environmental Requirements</td><td>✓</td><td>✓</td></tr><tr><td>SECTION 6 – Will comprise of the Financial Requirements</td><td>✓</td><td>✓</td></tr></table>	SECTION 1 – Will comprise of the Commercial and SD&L Requirements	✓	✓	SECTION 2 – Will comprise of the Technical Requirements	✓	✓	SECTION 3 – Will comprise of the Safety Requirements	✓	✓	SECTION 4 - Will comprise of the Quality Requirements	✓	✓	SECTION 5 – Will comprise of the Environmental Requirements	✓	✓	SECTION 6 – Will comprise of the Financial Requirements	✓	✓
SECTION 1 – Will comprise of the Commercial and SD&L Requirements	✓	✓																	
SECTION 2 – Will comprise of the Technical Requirements	✓	✓																	
SECTION 3 – Will comprise of the Safety Requirements	✓	✓																	
SECTION 4 - Will comprise of the Quality Requirements	✓	✓																	
SECTION 5 – Will comprise of the Environmental Requirements	✓	✓																	
SECTION 6 – Will comprise of the Financial Requirements	✓	✓																	

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	Ineligible tenderers will be disqualified.
2.2 - 2.5 Tender Closing	<p>The deadline for Tender submission is Date 07 December 2022 Time 10h00 Late Tenders will not be accepted</p> <p>Tenders are to be submitted to the Eskom <i>tender box</i> at the following physical address</p> <p>THE TENDER OFFICE Eskom Holdings SOC Limited Tender Box, ground floor No.10 Smuts Avenue Witbank / Emalahleni Mpumalanga</p>
2.9 Copy of original tender	<p>The tenderer must submit the tender as a complete original tender, plus one (1) hard copy of the original tender at tender submission deadline. Eskom may also require that one (1) additional complete soft copy of the original tender is required in electronic format</p> <p>The original and complete hard copy of the tender must clearly be divided as per 1.3 above</p> <p>Each section to be bound or put into a separate file. Do not submit loose pages</p> <p>The cover page of the file to have the following information:</p> <ul style="list-style-type: none"> • Company Details, • Tender Enquiry Number, • Description and • Power Station <p>Where a Tenderer does not submit 1 hard copy of the original tender at tender submission deadline, the tenderer will be disqualified</p>
2.13 Tender Validity Period	The tender validity period is 120 days
2.16 Clarification meetings	<p>A <i>Non-Compulsory clarification meeting</i> with representatives of the <i>Employer</i> will take place as follows Date 14 November 2022 Time 10:00 Venue MS Teams</p> <p>Tenderers must confirm via email their intention to connect for clarification meeting with the Eskom representative – NkunaSY@eskom.co.za by latest 11 November 2022 Time 14h00.</p>

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	<p>the name of Company, Name of representative, position and contact details. Maximum of 2 People from each company will be allowed to attend the clarification meeting.</p> <p>A <u>Non-Compulsory</u> Meeting will be held via Ms Teams, Although this will not be a compulsory meeting, suppliers are encouraged to attend the Clarification Meeting to ensure that all tendering companies clearly understand the requirements and are able to submit a responsive tender</p>
2 17 Clarification on enquiry documents	<p>The tenderer will notify the <i>Employer</i> of any clarifications required before the closing time for clarification queries, which is 05 (30 November 2022 @ 15h00) working days before the deadline for tender submission</p> <p>All enquiries MUST be done via email NkunaSY@eskom.co.za</p>
2 23 Alternative tenders	Alternative tenders are <i>not allowed</i>
2 25 Conditions of contract	The conditions of contract will be the <i>NEC3 Term Service Contract</i>
2 31 Provision of security for performance	Not applicable
3.4 Opening of tenders	<p>Tenders will be opened at the same date and time as the tender deadline,</p> <p>Tenders will be opened on Place: Eskom Holdings SOC Limited, NO.10 Smuts Avenue Witbank / Emalahleni Date: 07 December 2022 Time: 10h00</p>
3 5 Prices to be read out	Prices will <i>not be read out</i>
3 9 Basic Compliance	<p>Basic compliance for this invitation to tender are</p> <ul style="list-style-type: none"> • Meet the eligibility criteria for a tenderer • Submit one (1) hard copy of the original tender to Eskom • Submit a complete original tender with commercial, financial and technical information • Submission of the mandatory commercial tender returnables as at stipulated deadlines • Central Supplier Database (CSD) number (MAA. .)

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3 10 Mandatory tender returnables	A tenderer that does not submit mandatory documents/information in required in mandatory documents by the required deadlines as stipulated in the Tender Returnable section of the respective Invitation to Tender, will be deemed non-responsive						
3 11 Pre-qualification criteria	Pre-qualification criteria not applicable						
3 12 Designated materials and thresholds	Designated material thresholds are not applicable						
3 13 Functionality requirements	<p>Functionality requirements are applicable</p> <p>The following criteria will be applicable for this transaction under functionality criteria</p> <table border="1"> <thead> <tr> <th>Criteria</th><th>Weight</th></tr> </thead> <tbody> <tr> <td>Technical</td><td>100%</td></tr> <tr> <td>Threshold</td><td>70%</td></tr> </tbody> </table> <p>Tenderers who do not meet the threshold for functionality scoring will be disqualified and not be evaluated further See below detailed functionality requirements</p>	Criteria	Weight	Technical	100%	Threshold	70%
Criteria	Weight						
Technical	100%						
Threshold	70%						

Functionality/Technical Criteria Evaluation

Please see attached technical evaluation criteria

Minimum Threshold 70%

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3 15 Evaluation of price	<p>Prices will be evaluated as follows</p> <ul style="list-style-type: none">• Inclusive of VAT• Making the specified correction for arithmetical errors (Should arithmetical errors be found and corrected in terms of the prices, the Procurement Practitioner notifies the supplier of the applied corrections and requires that the supplier accept the corrections in writing, or that the tender will be withdrawn. The Procurement Practitioner does not permit the supplier the opportunity to stand by the uncorrected price or offer a new revised price.)• Excluding contingencies in any bill of quantities or activity schedule• Making an appropriate adjustment for any other acceptable variations, deviations, or alternative tenders submitted• Making a comparison of the Net Present Value of each adjusted tender based on the tendered programme (if provided) and prices, on the estimated effect of Price Adjustment Factors and rate of exchange fluctuations (if applicable) and on other evaluation parameters relating to uncertainty and risk, where applicable.• Unconditional discounts must be taken into account for evaluation purposes,• Conditional discounts must not be taken into account for evaluation purposes but should be implemented when payment is effected <p>Prices will be scored out of 80 points</p>
3 17 Evaluation of B-BBEE	<p>B-BBEE status will be scored out of 20 points in accordance with PPPFA</p> <p>If a tenderer fails to submit proof of B-BBEE status level, the tenderer will not be disqualified (except if B-BBEE level is a pre-qualification criterion) The tenderer will, however, be awarded 80 points for price and will score 0 points for B-BBEE level /status out of 20</p>
3 18 Ranking of tenders	<p>Suppliers will be ranked by applying the preferential point scoring based on the relevant system as stipulated hereunder -</p> <ul style="list-style-type: none">• 80/20

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	Eskom will then add the score from Pricing and the B-BBEE level together and rank the suppliers from the highest to the lowest
3 19 Objective Criteria (if applicable)	Objective criteria not applicable
3 20 Reverse e-auction (if applicable)	Reverse e-auction is not applicable
Contractual Requirements	<p>Contractual Requirements may include the following</p> <ul style="list-style-type: none"> • SHEQ requirements, • Financial statements, and • SDL&I <p>It must be noted that contractual requirements will be evaluated and companies will be given one opportunity after the first submission with tender to submit the outstanding requirements. The shortfalls and/or outstanding information will be communicated upfront to the tenderer who will then be requested to attend a session where the functional specialist will assist the tenderer to understand the outstanding requirements.</p> <p>The tenderer will then be afforded one opportunity to correct and resubmit within 5 working days after the clarification session</p> <p>It must be noted failure to submit the correct documents after the clarification session will result in the tender being disqualified</p> <p>Please Note: Contractual requirements are not evaluation criteria. They are required to be met and assessed after the evaluation and ranking of the tenders. Proof that the highest ranked tenderer is able to meet the contractual requirements, must be submitted prior to contract award. Failure to meet “Contractual Requirements “by the stipulated deadlines; may result in the tenderer being regarded as non-responsive and ineligible for contract award. In the event that there are further documents/actions that are required during execution of the contract, these must be made contractual conditions and compliance thereto must be managed in terms of the contract.</p>

CONTRACTUAL REQUIREMENTS:

Contractual Requirements Returnable means that tenderers will be given an opportunity to submit once, within ten (10) calendar days the outstanding Contractual Requirements Returnable which they would have missed or not submitted during the tender close out. Only those tenderers who submitted/responded within the specified time will be considered and those who did not respond will be rendered non-responsive. Commercial, Financial, Supplier Development Localisation and Industrialisation, Health and Safety, Environmental and Quality will only evaluate the shortlisted suppliers who passed/complied with the mandatory requirements

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SHEQ Requirements

SAFETY REQUIREMENTS

OHS requirements are stipulated in the SHE specifications that will be issued. The She spec will include the minimum requirements that must be adhered to by the successful contractor prior to commencement of the contract. The successful contractor will be approved in a form of an authorisation letter sent to the responsible contracts manager. The following tender returnables must be submitted at tender submission deadline:

- Annexure B
- Health and Safety plan/OHS manual
- H&S costing
- Baseline OHS risk assessment
- Valid letter of good standing or equivalent (LOGs)
- OHS policy (must be signed by the director of the company or CEO)
- Proof of OHS competency

ENVIRONMENTAL REQUIREMENTS

- Environmental Policy
- Aspect and impact register or an environmental management plan (relevant to the scope of work)
- Environmental Management System Certificate (if certified) if not, an environmental management system manual or procedures
- Waste Management Plan
- Proof of training of persons performing activities that could have significant impact on the environment

QUALITY REQUIREMENTS

Category 2 Requirements:


- Complete and signed Form A
- Quality Management System manual
- Quality Policy, aligned with the supplier's strategic direction (documented information)
- Quality Objectives (documented information)
- Control of documented information (both maintain and retain documented information)
- Internal audit procedure (documented information)
- Control of nonconforming outputs (documented information)
- Nonconformity and Corrective action procedure (documented information)
- Latest copy of the management system internal audit reports
- Draft contract quality plan
- Inspection and test plan (ITP) or quality control plan (QCP) on similar or previous work done
- Documented information for Control of Externally Provided Processes, Products and Services
- Documented information for roles, responsibilities and authorities in relation to the QMS
- Documented information retained (records) of management review meetings

FINANCIAL STATEMENTS

Audited Financial Statements of the *tenderer* 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.*

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SUPPLIER DEVELOPMENT, LOCALISATION AND & INDUSTRIALISATION

Section 1: Pre-qualification Criteria

Failure to meet Pre-qualification at tender stage will lead to disqualification

1.1 Minimum BBBEE status level of contributor?

If Yes, what is the BBBEE status and/or level required

YES	NO
<input type="checkbox"/>	<input checked="" type="checkbox"/>
N/A	

1.2 Is there BBBEE category targeted for this enquiry?

If Yes, BBBEE category

YES	NO
<input type="checkbox"/>	<input checked="" type="checkbox"/>
N/A	

Tender Returnable if the above elements are requirements,

- Valid original or certified copy of sworn affidavit in the case of EME's must be submitted (affidavit must be completed fully), or
- Valid Copy B-BBEE Certificate issued by CIPC for EME's, OR
- Valid original or certified copy of the B-BBEE certificate / sworn affidavit in the case of QSE's must be submitted, or
- Valid original or certified copy of the B-BBEE certificate issued by SANAS Accredited Verification Agency for Generic Entities must be submitted, or
- For JV's only valid original or certified copy B-BBEE Certificate issued by a SANAS Accredited Verification Agency will be accepted and the certificate should be in the name of the JV

1.3 Minimum subcontracting requirement for this?

If Yes, what is the minimum percentage?


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

Tender Returnable if the above element is a requirement,

- an EME or QSE which is at least 51% owned by black people,
- an EME or QSE which is at least 51% owned by black people who are youth,
- an EME or QSE which is at least 51% owned by black people who are women,
- an EME or QSE which is at least 51% owned by black people with disabilities,
- an EME or QSE which is 51% owned by black people living in rural or underdeveloped area or townships,
- a cooperative which is at least 51% owned by black people,
- a EME or QSE which is at least 51% owned by black people who are military veterans

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Section 2: Mandatory Requirements

The following requirements are mandatory for submissions must be achieved in full by the tenderer during evaluation

2.1 Local Content Designation

- a) Is this Commodity or part of it a Designated Sector?

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

Please indicate below Designated Components

Not Applicable as per email from Buyer and Technical

Commodity	Components	Local Content Threshold
N/A		

NOTE 1 If applicable SBD 6.2 Declaration Form and Annex C (Local Content Declaration-Summary Schedule) are a tender returnable and will be mandatory for contract award

2.2 CIDB Skills Development

- a) Is there CIDB compulsory training?

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

If Yes, what is the % of the Construction Skills Development Goal % (CSDG)

If the answer above is Yes, it will then be mandatory for the supplier to match Eskom's targets

Criteria	Eskom Target	Tenderer Commitment
CSDG Percentage	N/A	
Description	N/A	

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Mandatory Compliance for Contract Award continues.....

2.3 BBBEE Compliance

Is there minimum BBBEE level targeted?

YES	NO
<input checked="" type="checkbox"/>	<input type="checkbox"/>
Successful tenderer to achieve, maintain or improve a B-BBEE	

If Yes, what is the BBBEE status targeted for this transaction (contractor/s will be required to submit plans to achieve the target level if not met at contract award)

2.4 Local Procurement Content

"Local Procurement Content" refers to value added in South Africa by South African resources. Where a single contract involves a combination of local and imported goods and/or services, the tender response must be separated into its components as per the Price Schedule included with the tender documents. Local procurement content is total spend minus the imported component.

Local Procurement Content	Eskom Target	Tenderer Proposal
	100%	

2.5 Subcontracting Requirements

Is there a requirement for subcontracting?

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

If Yes, what is the targeted subcontracting percentage

2.6 Enterprise Development

Are there specific ED requirements?

(This ED intervention can either be separate or additional to subcontracting requirements, but duplication should be avoided)

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

If Yes, the main contractor is required propose development in the following areas or against the following Eskom's targets

Eskom's Target	Tenderer Proposal
N/A	

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Skills Development

Eskom reserves the right to negotiate with the tenderer on Eskom's requirements. The outcome of the negotiations will be a contractual obligation. If negotiations are not required, the tenderer's SDL&I undertaking will become a contractual condition.

Skills development is designed to benefit the currently unemployed graduates from school, further education and training campuses and universities.

The composition of these candidates must be representative of the population demographics of South Africa. Note that these targets for skills development candidates categorically exclude Eskom employees and registered learners.

It is expected that the total of 1 individual will benefit through courses stipulated below (if the budgeted value for this service is utilized) over the period of 3 years. This is how it will be applied:


- ✓ Successful tenderer will be obligated to **skill one** candidate
- ✓ This obligation will be for the duration of the contract; however, the supplier needs to demonstrate positive progress on a monthly basis.
- ✓ Candidates shall be sourced from previously disadvantaged groups in South Africa, particularly at the site where the services will be taking place.

Tenderers are required to propose against the following training initiatives:

Eskom's Target			
Category	Number	Entry Level	Output
N/A			

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Section 3: SDL&I Penalty and Performance Security

- Eskom will apply a penalty of 2.5% of the Contract Value for failure to meet SDL&I obligations
- One of the following options will apply for SDL&I performance security
- For the duration of the contract, Eskom will retain 2.5% of every invoice (excluding VAT) as security for the fulfilment of all SDL&I Obligations. The retained amounts shall only be released to the Contractor upon fulfilment of all SDL&I obligations at the end of the contract
- Alternatively the Contractor shall submit a bond equivalent to 2.5% of the Contract Value and shall only be released to the Contractor upon fulfilment of all SDL&I Obligations
- Panels- Eskom will apply 2.5% retention on every invoice (excluding VAT) after all cumulative task orders awarded to the Contractor/Service Provider that have reached a stipulated threshold as security for the fulfilment of the SDL&I obligations

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- Panels- Eskom will apply 2.5% retention on every invoice (excluding VAT) after all cumulative task orders awarded to the Contractor/Service Provider that have reached a stipulated threshold as security for the fulfilment of the SDL&I obligations

Section 4: Reporting and Monitoring

- The suppliers shall on a monthly/quarterly basis submit a report to Eskom in accordance with Data Collection Template on their compliance with the SDL&I obligations described above
- Eskom shall review the SDL&I reports submitted by the suppliers within 60 (sixty) days of receipt of the reports and notify the suppliers in writing if their SDL&I obligations have not been met
- Upon notification by Eskom that the suppliers have not met their SDL&I obligations, the suppliers shall be required to implement corrective measures to meet those SDL&I obligations before the commencement of the following report, failing which Retention clauses shall be invoked
- Every contract shall be accompanied by the SDL&I Implementation Schedule which must be completed by the suppliers and returned to SDL&I representative for acceptance 30 days after contract award.

Section 5: Market Research

The following information demonstrates market analysis and assisted in arriving at BBEE targets above:

The following information demonstrates market analysis and assisted in arriving at Subcontracting targets above:

Section 7: General Information on Validity of Sworn Affidavits


The following must be considered when it comes to validity of Affidavits:

Tenderers submitting B-BBEE Sworn Affidavits must ensure that the affidavits meet the following key pointers to ensure their validity:

- Name/s of deponent as they appear in the identity document and the identity number
- Designation of the deponent as the **director, owner or member** must be indicated in order to know that person is duly authorised to depose of an affidavit. **(Mark the applicable option).**
- Name of enterprise as per enterprise registration documents issued by the CIPC, where applicable, and enterprise business address.
- Percentage of black ownership, black female ownership and designated group. In the case of specialised enterprises as per Statement 004, the percentage of black beneficiaries must be reflected. **(No blank spaces to be left).**
- Indicate total revenue for the year under review and whether it is based on **audited financial statements or management account (Mark the applicable option).**
- Financial year end as per the **enterprise's registration documents**, which was used to determine the total revenue **(Financial year end to be stipulated by day/month/year).**

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PART B – QUANTITATIVE TECHNICAL EVALUATION CRITERIA – SUPPLY AND DELIVERY OF RAW WATER PRE-TREATMENT CHEMICALS FOR POTABLE WATER PRODUCTION									
* First stage Evaluation: Tender documents and Jar Test Results will be required to meet 60% qualifying score in order to be allowed to do Pre-contract trials (2nd stage) on the plant								Proposals	
Evaluation: Pre-contract Trial meet a total of 70% (inclusive of the 1st stage score) qualifying score to be deemed technically suitable								* Second Stage Proposals will be required to	
	Sections	KPI: Criteria Evaluation Indicator	Source	%	0	2	4	5	Score
SECTION 1: TECHNICAL REQUIREMENTS									
Nr	Technical requirements				0%	40%	60%	100%	
Stage 1 Criteria	1	Technical Personnel Qualification	SOW/MEP 051315 Section 2.20	CV of the responsible person with related work experience on pre-treatment plants of similar design	20%	< 2 years of work experience and of the work experience mentioned is not of similar design	≥ 2 but < 4 years with related work experience on pre-treatment plants of similar design	≥ 4 but < 5 years with related work experience on pre-treatment plants of similar design	≥ 5 years with related work experience on pre-treatment plants of similar design
	2	Previous work experience report	SOW/MEP 051315 Section 2.19	Report upon all the details as per SOW	20%	0 references or references are mentioned but with no additional details	1-2 references and most of the points mentioned in each reference	3-4 references and most of the points mentioned in each reference	5 or more references in report and all 6 points mentioned in each reference
	3	Detailed MSDS	SOW/MEP 051315 Section 2.3 & 2.10	Detailed 16 points Material Safety Data Sheet (MSDS) with a South African contact number for each chemical. The MSDS must state the main active ingredient and the concentration thereof	10%	0 MSDS attached	MSDSs attached for both chemicals but not detailed		Detailed MSDSs attached for both chemicals
	4	Jar test results as per Eskom RT&D report	SOW/MEP 051315 Section 2.15	Test results as mentioned in Eskom RT&D test report and supplier report	25%	< 30% TOC removal and/or Turbidity > 3 NTU	≥ 30.6 to < 35% TOC removal and Turbidity < 3 NTU	≥ 35% to < 40% TOC removal and Turbidity < 3 NTU	≥ 40.6 TOC removal and Turbidity < 3 NTU
TOTAL SCORE FOR 1ST STAGE EVALUATION									must be ≥ 55% to commence to 2nd stage
Stage 2 Criteria	5	Jar test results as per Eskom RT&D report	SOW/MEP 051315 Section 2.16	Trial test results as mentioned in the Eskom RT&D trial report and supplier report	25%	< 30% TOC removal and/or Turbidity > 3 NTU and/or residual aluminium > 300 ug/kg	≥ 30.6 to < 35% TOC removal Turbidity < 3 NTU and residual aluminium < 300 ug/kg	≥ 35% to < 40% TOC removal Turbidity < 3 NTU and residual aluminium < 300 ug/kg	≥ 40.6 TOC removal Turbidity < 3 NTU and residual aluminium < 300 ug/kg
	TOTAL SCORE FOR 2ND STAGE EVALUATION								
TOTAL SCORE FOR STAGE 1 AND STAGE 2 EVALUATION									must be ≥ 70% to be deemed technically suitable

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PART A: MANDATORY TECHNICAL REQUIREMENTS

MATLA POWER STATION: POTABLE PRE-TREATMENT CHEMICALS

	Yes	No	Required (Mandatory) - PLEASE ATTACH THE FOLLOWING:
The coagulant and flocculent should be separate products and both should be in the liquid form			Tender returnable should be detailed 16 point Material/Product Data sheets indicating that the chemicals are in liquid state and two separate chemicals
All chemicals selected must comply with the relevant SANS standards. SANS 50881, SANS 50883, SANS 51407, SANS 51409, SANS 51410 & should be registered with the National Sanitation Foundation (NSF)			Proof of chemicals certification must be provided with the tender returnable, which can be confirmed on the NSF website for compliance

RESPECTIVE CONTRACTOR. ALL BLOCKS MUST BE TICKED YES IN ORDER TO PROCEED TO PART B. IF PROOF NOT ATTACHED AS REQUIRED ON COLUMN L, THE CONTRACTOR WILL BE SCORED "NO".

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OBJECTIVE CRITERIA:


MATLA POWER STATION. MOBILE RO PLANT

Signed Environmental Policy in line with ISO 14001	Attached the copy
Preliminary Programme/Plan	Attached the copy
Health and Safety Plan	Attached the copy
Health and Safety Requirements as per the attached Contractor SHE Assessment Form	Attached the copy
Quality requirements as per the attached Procurement Quality Assurance List of tender deliverables	Attached the copy

Note: the above requirements are required for the contract award phase

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1.3 TENDER RETURNABLES

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

Reference	Returnables from supplier	Returnables mandatory for evaluation purposes and due at tender closing	Returnables mandatory for contract award and due prior to contract award
Basic Compliance	One (1) hard copy of the tender	✓	
Pre-qualification criteria : <ul style="list-style-type: none"> B-BBEE levels/EME/QSE <i>Sub-contracting to designated groups</i> <p>Please Note that : “proof of B-BBEE status level of contributor” means- (a) the B-BBEE status level certificate issued by an authorised body or person; or (b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or (c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act;</p> <p>If “proof of B-BBEE status level of contributor” is required for pre-qualification purposes in terms of PPPFA regulations, and is either not submitted</p>	“Proof of B-BBEE status level of contributor” for main contractor	N/A	
	CSD number	N/A	
	Signed Sub-contracting intent agreement	N/A	
	“Proof of B-BBEE status level of contributor” for sub-contractor belonging to designated group	N/A	
	Any other supporting documents to verify the status of the main contractor or sub-contractor(as may be stipulated in 3.11)	N/A	

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by tender submission deadline or deemed invalid; , the respective tenderer must be disqualified			
Annexure A	Acknowledgement Form		✓
Annexure B	Tenderers Particulars		✓
Annexure C	Integrity Pact Declaration form	✓	
Annexure D	CPA for local goods/services		✓
Annexure E	CPA(IG) for imported goods/services		✓
Annexure F1-F4	SBD 6 2 -Declaration certificate for local production and content and Annexures C, D, E		N/A
Annexure G (applicable for all suppliers including Foreign suppliers)	SBD 1- to be submitted with the tender at tender submission deadline		✓
Annexure H	SBD 6 1- Preference Points Claim Form in terms of PPPFA 2017 regulations		✓
Annexure I	SBD4 - Bidders Disclosure Form		✓
Annexure K	Supplier Development & Localisation (SD&L) Undertaking		✓
Annexure L	Authority to submit a tender		✓
CSD Number / Report	CSD Number / Report	✓	
CIPC / Company Registration Documents	CIPC / Company Registration Documents		✓
Letter of Good Standing	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)		✓
Reverse e-auction training acknowledgement form	Reverse e-auction training acknowledgement form	N/A	
Additional Documents required in event of JV:-	Letter of intent to form a JV/consortium		✓
	Valid joint venture agreement confirming the rights and obligations of each of the joint venture partners and their profit-sharing ratios		

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	Written confirmation that the joint venture will operate as a single business entity (incorporated) for the duration of the contract (this may be included as an obligation within the JV agreement)		✓
	“proof of B-BBEE status level of contributor” means - (a) the B-BBEE status level certificate issued by an authorised body or person, or (b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice, or (c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act, (as may be applicable for the particular tendering entity)	✓	
	Details and confirmation of a single designated bank account in the name of the JV and independent of the individual JV partners, as set out in the joint venture agreement		✓
*“proof of B-BBEE status level of contributor” means:- (a) the B-BBEE status level certificate issued by an authorised body or person; or (b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or (c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act;	Failure on the part of the supplier to submit “proof of B-BBEE status level of contributor” for purposes of evaluation and scoring by the tender closing will not result in disqualification (if tenderer is otherwise deemed to be responsive/acceptable in all other aspects and it is not a pre-qualification criterion) The tenderer will, however, be scored zero on B-BBEE for purposes of PPPFA scoring and ranking	✓	
Tax Clearance Certificates	A certified copy of a tax clearance certificate is still required by Foreign suppliers (with a footprint in South Africa- but who are not on CSD and have not provided a SARS pin number) and Local suppliers (who have not provided their SARS e-filing PIN number for verification by Eskom and/or their CSD profile / CSD number) .		✓

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	Foreign suppliers with no footprint in South Africa, must still complete the SBD1 document, however no proof of tax compliance is required		
Tax Evaluation Questionnaire (if services contract and was included as annexure)	Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE		✓
Compliance with Employment Equity Act	To the extent that the tenderer falls within the definition of a "designated Employer" as contemplated in the Employment Equity Act 55 of 1998, the tenderer is required to furnish the Employer with proof of compliance with the Employment Equity Act, including proof of submission of the Employment Equity report to the Department of Labour (South African tenderers only)		✓
CIDB (where applicable)	Valid proof of the required cidb grading designation for the main contractor, JV and /or sub-contractor as may be required in the tender data at tender closing deadline or within 21 working days from the closing date of submission of tenders if this is agreed with the Employer	N/A	
Shareholding	Shareholding organogram and detailed breakdown (for each individual company/JV member) clearly identifying percentages owned by individual shareholders (full names & ID Numbers) and other entities (provide full legal/trading name and respective identifying registration/trust numbers)		✓
NEC Documentation	<ul style="list-style-type: none"> Completed NEC3 TSC Pricing Schedule Completed NEC3 TSC Contract Data 	✓	
DOCUMENTS REQUIRED UNDER CONTRACT REQUIREMENTS			

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Safety	<p>OHS requirements are stipulated in the SHE specifications that will be issued. The She spec will include the minimum requirements that must be adhered to by the successful contractor prior to commencement of the contract. The successful contractor will be approved in a form of an authorisation letter sent to the responsible contracts manager. The following tender returnables must be submitted at tender submission deadline:</p> <ul style="list-style-type: none"> • Annexure B • Health and Safety plan/OHS manual • H&S costing • Baseline OHS risk assessment • Valid letter of good standing or equivalent (LOGs) • OHS policy (must be signed by the director of the company or CEO) • Proof of OHS competency 		✓
Quality	<p>Category 2 Requirements:</p> <ul style="list-style-type: none"> • Complete and signed Form A • Quality Management System manual • Quality Policy, aligned with the supplier's strategic direction (documented information) • Quality Objectives (documented information) • Control of documented information (both maintain and retain documented information) • Internal audit procedure (documented information) • Control of nonconforming outputs (documented information) • Nonconformity and Corrective action procedure (documented information) • Latest copy of the management system internal audit reports • Draft contract quality plan 		✓

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	<ul style="list-style-type: none"> • Inspection and test plan (ITP) or quality control plan (QCP) on similar or previous work done • Documented information for Control of Externally Provided Processes, Products and Services • Documented information for roles, responsibilities, and authorities in relation to the QMS • Documented information retained (records) of management review meetings 		
Environmental	<ul style="list-style-type: none"> • Environmental Policy • Aspect and impact register or an environmental management plan (relevant to the scope of work) • Environmental Management System Certificate (if certified) if not, an environmental management system manual or procedures • Waste Management Plan • Proof of training of persons performing activities that could have significant impact on the environment 		✓
Due Diligence	<p>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</p> <p>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 <i>each participant in the JV / SPV</i> 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</p>		✓

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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 (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)	
Shareholding information (for each individual company/JV member) clearly identifying percentages owned by individual shareholders (full names & ID Numbers) and other entity shareholders (provide full legal/trading name and respective identifying registration/trust numbers)	Include as separate tender returnable if required
Contact person	
Telephone number	
E-mail address	
Postal address (also of each member in the case of a JV)	
Physical address (also of each member of the JV)	

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

Name of contractor	
CIPC Registration number	
VAT registration number	
CIDB Registration number (if applicable) and CIDB grade specified for the sub-contractor as may be stipulated in the Tender Data	
Shareholding organogram /breakdown (for each individual company/JV member) clearly identifying percentages owned by individual shareholders (full names& ID Numbers) and other entities (provide full legal/trading name and respective identifying registration/trust numbers)	
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

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- 4 You may register online at National Treasury website on www.treasury.gov.za
5. Alternatively, you may contact [•] **[Shiluva Nkuna, Email: NkunaSY@eskom.co.za].**
- 6 If you are registered on SARS Efiling system, please provide your pin number in order to verify your tax compliant status _____
- 7 If you are required to be tax compliant as per SBD 1, but are not registered on CSD (foreign suppliers) or have not provided your SARS Efiling pin, please confirm that you have attached/will send a copy of a current valid tax compliant certificate as a tender returnable (by contract award stage)

YES	<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"/>
-----	--------------------------	----	--------------------------

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

If Eskom decides to apply the sub-contracting provision as specified in Regulation 4(c) all tenders above the prescribed maximum threshold for quotations must be advertised through an open competitive bidding process subject to potential tenderers meeting the 30% minimum subcontracting requirement to EMEs or QSEs that are 51% owned by the following enterprises

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

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

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

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

A. Single tenderers

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

Signature _____

Designation _____

Date _____

B. Joint Ventures

We, the undersigned, are submitting this tender in Joint Venture and hereby authorise Mr/Ms _____ (full names), an authorised signatory of _____, (insert the full legal name of the business entity 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

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

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ANNEXURE C

INTEGRITY DECLARATION FORM

(Form to be completed and signed by supplier/tenderer as Invitation to Tender/RFP returnable or as part of contract modification documentation)

1. DECLARATION OF INTEREST

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

- the *tenderer/s* employees/directors are also employees/contractors/consultants/ directors in the state or a state owned entity
- the *tenderer/s* employees/directors are also employees/contractors/consultants/ directors of Eskom
- the *tenderer/s* employees/directors are also employees/contractors/consultants or directors in another entity together with Eskom employees/consultants/contractors/ directors
- the *legal person/s* (including its employees/contractors/directors/members/ shareholders) on whose behalf the tender documents are signed, is in some other way "related" to an Eskom employee/contractor/consultant/director involved in the tender evaluation/tender adjudication/tender negotiation. "Related" meaning that -
 - an individual is related to another individual if they are married, or live together in a relationship similar to marriage,
 - or are separated by no more than two degrees of natural or adopted consanguinity or affinity,
 - an individual is related to a juristic person if the individual directly or indirectly controls the juristic person, as determined in accordance with the definition of "control" (as per Companies Act section 2(1)), and
- a juristic person is "related" to another juristic person if :-
 - (1) either of them directly/indirectly controls the other, or the business of the other, as determined in accordance with the definition of "control" (as per Companies Act section 2(1)),
 - (2) either is a subsidiary of the other, or
 - (3) a person directly/indirectly controls each of them, or the business of each of them, as determined in accordance with the definition of "control"
- the *tenderer/s* and one or more of the *tenderers* in this tendering/RFP process have a controlling partner in common, or a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another tenderer, or influence the decisions of Eskom regarding this bidding process,

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

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

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

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

2. DECLARATION OF FAIR TENDERING PRACTICES

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

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

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

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

Item	Question	Yes/No	No
1 1	<p>Is the tenderer/s(or any of its directors/members/shareholders) listed on National Treasury's Database of Restricted Suppliers as companies/persons prohibited from doing business with the public sector</p> <p>[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].</p> <p>The Database of Restricted Suppliers can be accessed on the National Treasury's website (www.treasury.gov.za)</p>		
1 2	<p>Is the tenderer/s (or any of its directors / members / shareholders)? listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combatting of Corrupt Activities Act (No 12 of 2004)</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za)</p>		
1 3	<p>Was the tenderer/s (or any of its directors/members/shareholders) 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		

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14	Was the tenderer/s (or any of its directors/members/shareholders) prohibited from doing business with any International Financial Development/funding Agency or Lending Institution		
15	Is there any history/record of the tenderer/s (or any of its directors/members/shareholders) failing to meet their contractual obligation with any SOC?		

I, the undersigned, _____ 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)

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.

Signature:	
Designation and capacity in which signing:	
Date:	

Joint Ventures


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

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 this declaration prove to be false.

Signature:	
Designation and capacity in which signing :	
Date:	

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(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.

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

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

b. Additional/Alternative offer:


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

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

Additional/Alternative Offers must be clearly indicated as such

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3. ESKOM'S PREFERRED INDEX LIST

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

4. FOREIGN PORTION OF THE TENDER/AGREEMENT PRICE

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

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

5. NUMBER OF FORMULAE & INDICES

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

6. CPA FIXED PORTION


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

7. BASE DATE

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

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The Cash Settlement or Cash Sellers Price

- Where applicable, these principles, must also apply for the CPA "cut-off" date

8. CPA FOR PROFESSIONAL SERVICES

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

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

No fixed portion is mandatory

Signed

Date

Name

Position


Tenderer

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

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

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allowance is paid	Lead SEIFSA ,F, lead	SEIFSA, G, building and construction material		Or <ul style="list-style-type: none"> • Intermediate Manufactured Goods OR • SEIFSA Table U Producer Price Index (PPI) - final manufactured GOODS OR Intermediate Manufactured Goods
-------------------	----------------------	---	--	--

Table 2: Preferred Foreign Index List

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

Closing date of tender _____ / _____ / _____

TENDERER'S SIGNATURE _____

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ANNEXURE E

CPA (IG) REQUIREMENTS FOR FOREIGN GOODS AND SERVICES

CONTRACT PRICE ADJUSTMENT AND FOREX PAYMENTS – IMPORTATION

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

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

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

PART 1: PAYMENT OF FOREIGN COMMITMENTS

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

Payment Method 1A:

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

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

Applicable (Y / N)

Payment Method 1B,

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

Please note

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

Applicable(Y/N) or

Payment Method 2:

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

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the supplier

Please note

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

Applicable (Y/N).....

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

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

Fixed ZAR pricing

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

Applicable (Y/N).....

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

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

PART 2: EXCHANGE RATES

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

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


PART 3: ADJUSTMENT OF IMPORTATION COSTS, ETC

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

	RATES/TARIFFS
Sea/Air Freight	

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

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

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

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

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

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

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

4 1 MANUFACTURING CPA METHOD (LABOUR AND MATERIAL)

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

4 2 EXPATRIATE LABOUR METHOD


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

4 3 OTHER VALUES METHOD (e g Engineering fees, design fees, barging, inland transportation, etc)

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

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

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

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


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

Closing date of tender _____/_____/_____

TENDERER'S SIGNATURE _____

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ANNEXURE F1 – NOT APPLICABLE

SBD 6.2

DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS

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

Before completing this declaration, bidders must study the General Conditions, Definitions, Directives applicable in respect of Local Content as prescribed in the Preferential Procurement Regulations, 2017, the South African Bureau of Standards (SABS) approved technical specification number SATS 1286 2011 (Edition 1) and the Guidance on the Calculation of Local Content together with the Local Content Declaration Templates [Annex C (Local Content Declaration Summary Schedule), D (Imported Content Declaration Supporting Schedule to Annex C) and E (Local Content Declaration Supporting Schedule to Annex C)].

1. General Conditions

- 1.1 Preferential Procurement Regulations, 2017 (Regulation 8) make provision for the promotion of local production and content.
- 1.2 Regulation 8 (2) prescribes that in the case of designated sectors, organs of state must advertise such tenders with the specific bidding condition that only locally produced or manufactured goods, with a stipulated minimum threshold for local production and content will be considered.
- 1.3 Where necessary, for tenders referred to in paragraph 1.2 above, a two stage bidding process may be followed, where the first stage involves a minimum threshold for local production and content and the second stage price and B-BBEE.
- 1.4 A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 1.5 The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286 2011 as follows:

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

Where

x is the imported content in Rand

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

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.

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

- 1.6 A bid may be disqualified if this Declaration Certificate and the Annex C (Local Content Declaration Summary Schedule) are not submitted as part of the bid documentation,
2. The stipulated minimum threshold(s) for local production and content (refer to Annex A of SATS 1286:2011) for this bid is/are as follows:

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

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

(Tick applicable box)

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

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

The relevant rates of exchange information is accessible on www.reservebank.co.za

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


Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

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

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

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

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

IN RESPECT OF BID NO.

ISSUED BY (Procurement Authority / Name of Institution)

...
NB

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


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

- (a) The facts contained herein are within my own personal knowledge
- (b) I have satisfied myself that
 - (i) the goods/services/works to be delivered in terms of the above-specified bid comply with the minimum local content requirements as specified in the bid, and as measured in terms of SATS 1286 2011, and
- (c) The local content percentage (%) indicated below has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4 1 above and the information contained in Declaration D and E which has been consolidated in Declaration C

Bid price, excluding VAT (y)	R
Imported content (x), as calculated in terms of SATS 1286 2011	R

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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 14 of the Preferential Procurement Regulations, 2017 promulgated under the Preferential Policy Framework Act (PPPFA), 2000 (Act No 5 of 2000)

SIGNATURE: _____ DATE: _____

WITNESS No. 1 _____ DATE: _____

WITNESS No. 2 _____ DATE: _____

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



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



Adobe Acrobat Document

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

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER		CLOSING DATE		CLOSING TIME	10h00
DESCRIPTION					
THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
	<input checked="" type="checkbox"/> S PIN		OR	CSD No	<input type="checkbox"/>
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT		<input type="checkbox"/> Yes <input type="checkbox"/> No
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
	<input type="checkbox"/>	A REGISTERED AUDITOR			
		NAME			
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs& QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					

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

PART B TERMS AND CONDITIONS FOR BIDDING

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

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PROOF OF TCS / PIN / CSD NUMBER

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

3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS


- | | |
|---|--|
| 3.1 IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| 3.2 DOES THE BIDDER HAVE A BRANCH IN THE RSA? | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| 3.3 DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? | <input type="checkbox"/> YES <input type="checkbox"/> NO |
| 3.4 DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? | <input type="checkbox"/> YES <input type="checkbox"/> NO |

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

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

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status level of contribution are not claimed


- 1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser

2. DEFINITIONS

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

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3. POINTS AWARDED FOR PRICE

3.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20

or

90/10

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

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{min} = Price of lowest acceptable bid

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

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


B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

5. BID DECLARATION

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

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

- 6.1 B-BBEE Status Level of Contributor = . (maximum of 10 or 20 points)
- (Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor)

7. SUB-CONTRACTING

- 7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

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

- 7.1.1 If yes, indicate

- i) What percentage of the contract will be subcontracted %
- ii) The name of the sub-contractor
- iii) The B-BBEE status level of the sub-contractor

- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)


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

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

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

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OR		
Any EME		
Any QSE		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8 1 Name _____ of
company/firm

8 2 VAT _____ registration
number

8 3 Company _____ registration
number

8 4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
☐ One person business/sole propriety
☐ Close corporation
☐ Company
☐ (Pty) Limited
 [TICK APPLICABLE BOX]

8 5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

8.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
☐ Supplier
☐ Professional service provider
☐ Other service providers, e g transporter, etc.
 [TICK APPLICABLE BOX]

8 7 Total number of years the company/firm has been in
business .

8 8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the
company/firm, certify that the points claimed, based on the B-BBE status level of
contributor indicated in paragraphs 1 4 and 6 1 of the foregoing certificate, qualifies
the company/ firm for the preference(s) shown and I / we acknowledge that

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