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|  | <b>Invitation to Tender/ Request for Proposal (RFP)</b> | <b>Document Identifier</b> | 240-114238630 | <b>Rev</b> | 11 |
|   |   | <b>Effective Date</b>      | August 2022   |            |    |
|   |   | <b>Review Date</b>         | August 2027   |            |    |

## ESKOM HOLDINGS SOC LTD

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

#### FOR

The provision of SAQA Accredited Generation Division GTLP Advanced Management and Leadership Development Interventions in support of Generation Technical Leadership Programme (GTLP) for a period of 36 months

|  |   |
|--|---|
| <b>Tender number/ RFP number</b>   | <b>MWP1381GX-R</b>  |
| <b>Issue date</b>  | <b>12 SEPTEMBER 2022</b>  |
| <b>Closing date and time</b>   | <b>26 SEPTEMBER 2022 at 10h00</b>   |
| <b>Tender validity period</b>  | <b>52 weeks from the closing date and time</b>  |
| <b>Clarification meeting</b>   | <b>Venue: Non-Compulsory Microsoft Teams Meeting</b><br><b>Date: 20 September 2022</b><br><b>Time: 10:00a.m – 12:00p.m</b><br><a href="#">Click here to join the meeting</a>  |
| <b>Tenders are to be delivered to the following address on the stipulated closing date and time:</b> | <b>TENDER ADVICE CENTER (Eskom Retail Park)</b><br><b>Eskom Holdings SOC Limited</b><br><b>Megawatt Park</b><br><b>Maxwell Drive, Extension 3</b><br><b>Sunninghill, Johannesburg</b><br><b>South Africa, 2157.</b> |

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## Invitation to Tender/Request for Proposal

Eskom Holdings SOC Ltd (hereinafter “Eskom”) invites you to submit a *tender/proposal* for The provision of SAQA Accredited Generation Division GTLP Advanced Management and Leadership Development Interventions in support of Generation Technical Leadership Programme (GTLP) for a period of 36 months

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

- Free of charge

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

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

Yours faithfully

*B. Mlambo*

Bonny Mlambo

Middle Manager Procurement

Date: 12 September 2022

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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<br>(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                   |
| 1.1.7  | *SBD 1 -Invitation to Bid must be filled out by all tenderers and submitted with the tender at tender submission deadline  | Annexure G                             | Y                   |
| 1.1.6  | *SBD 6.1- Preference Points Claim Form in terms of PPPFA 2017 regulations  | Annexure H                             | Y                   |
| 1.1.7  | *SBD 4 – Bidders Disclosure  | Annexure I                             | Y                   |
| 1.1.8  | Tax Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE (It is preferable to use the <a href="#">Excel template as it provides automatic results</a> ). | Annexure J                             | Y                   |
| 1.1.9  | Supplier Development & Localisation (SDL&I) Undertaking (if applicable )<br><b>The supplier is required to propose the number of jobs that will be created.</b>  | Not Applicable                         | N                   |
| 1.1.10 | Non-Disclosure Agreement (NDA) Vendors   | Annexure K                             | Y                   |
| 1.1.11 | Pricing Schedule   | Annexure L                             | Y                   |

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

| Clause Number from Standard Conditions of Tender  | Tender Data  |
|---|--|
| 1.1 Parties                                       | <p>The <i>Employer</i> is <b>Eskom Holdings SOC Ltd</b></p> <p>The Eskom <i>Representative</i> is:<br/> Name: <b>Refilwe Manamela</b><br/> Tel: <b>+27 11 800 8526</b><br/> E-mail: <b>ManameR@eskom.co.za</b></p>   |
| 1.3 Enquiry documents                             | <p>The Invitation to tender /RFP number is : <b>MWP1381GX-R</b></p> <p>See the content list above for the enquiry documents.</p>   |
| 1.4 Type of Invitation to Tender/RFP              | <p>This invitation to tender/RFP is:</p> <ol style="list-style-type: none"> <li>1. An open Invitation to tender</li> </ol>   |
| 1.6 Eskom's rights to accept or reject any tender | <p>The tender shall be for the <b>whole</b> of the contract.</p>   |
| 2.1 Eligible tenders                              | <p>Submit a tender only if the tenderer (whether a single company or a structure similar to a Joint Venture) complies with the <i>eligibility criteria</i> stated in the Tender Data and the tenderer, or any of his principals, is not under any restriction to do business with Eskom/State Owned Companies.</p> <p>Tenderers are deemed <b>ineligible</b> to submit a <i>tender/proposal</i> if</p> <ul style="list-style-type: none"> <li>• Tenderers have the nationality of a country on any international sanctions list. A tenderer shall be deemed to have the nationality of a country if the tenderer is a national or is constituted, incorporated, or registered and operates in conformity with the provisions of the laws of that country. This criterion shall also apply to the determination of the nationality of proposed subcontractors or suppliers for any part of the Contract including related services.</li> <li>• Tenderers submit more than one tender/proposal either individually or as a partner in a joint venture (JV) or consortium</li> <li>• [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>• A Tenderer must not have a conflict of interest. All Tenderers found to have a conflict of interest shall be disqualified. A</li> </ul> |

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|                             |  |
|-----------------------------|--|
|                             | <p>Tenderer may be considered to have a conflict of interest with one or more parties in this tendering/RFP process, if :</p> <ul style="list-style-type: none"> <li>○ (a) they have a controlling partner/majority shareholder in common; or</li> <li>○ (b) they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another Tenderer, or influence the decisions of the Employer regarding this bidding process;</li> </ul> <ul style="list-style-type: none"> <li>• Tenders signed by non- authorized persons</li> <li>• Where the tenderers are not registered on National Treasury's Central Supplier Database (except Foreign Suppliers)</li> <li>• A tender that fails to meet any pre-qualifying criteria stipulated in the tender documents is an unacceptable tender (section 4 (2) of PPPFA Regulations</li> <li>• Any tenderer that is restricted by National Treasury</li> <li>• A tenderer that sub-contracts 100% Scope of Work.</li> </ul> <p><b>Ineligible tenderers will be disqualified.</b></p> |
| 2.2 -2.5 Tender Closing     | <p>The deadline for <b><i>Tender/RFP</i></b> submission is :<br/> Date: <b>26 SEPTEMBER 2022</b><br/> Time: <b>10h00</b><br/> <b>Late Tenders will not be accepted</b><br/> Tenders are to be submitted to the Eskom <i>tender box</i> at the following physical address:<br/> <b>THE TENDER OFFICE</b><br/> <b>TENDER ADVICE CENTER (Eskom Retail Park)</b><br/> <b>Eskom Holdings SOC Limited</b><br/> <b>Megawatt Park</b><br/> <b>Maxwell Drive, Extension 3</b><br/> <b>Sunninghill, Johannesburg</b><br/> <b>South Africa, 2157.</b></p>   |
| 2.9 Copy of original tender | <p>The tenderer must submit the tender as a complete original tender, plus one (1) complete <b>hard copy</b> of the original tender at tender submission deadline. Eskom also requires that one (1) complete additional soft copy of the original tender is required in electronic format. <b><u>Folders should be separated clearly as follows:</u></b></p> <p>Commercial<br/> Technical<br/> Finance<br/> SHE<br/> Quality<br/> SD&amp;L<br/> Tax</p>  |

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|  | <p>Where a Tenderer does not submit 1 complete hard copy of the original tender at tender submission deadline, the tenderer will be disqualified. Eskom requires complete electronic copies for tender evaluations.</p> <p><b><u>Evaluations are based on the copies provided. Therefore, it is the tenderer's responsibility to ensure that the copy is 100% identical to the original and Eskom will not accept any liability if it bases its evaluation on an incomplete copy provided by the tenderer.</u></b></p>   |
| 2.13 Tender Validity Period                | The tender validity period is <b>52 weeks</b>  |
| 2.16 Site/clarification meetings           | <p>A <b><u>Non-Compulsory clarification Meeting</u></b> with representatives of the <i>Employer</i> will take place as follows:</p> <p>Date: <b>20 SEPTEMBER 2022</b><br/> Time: <b>10:00a.m – 12:00p.m</b><br/> Venue: <b>Non-Compulsory Meeting via Microsoft Teams Meeting</b>      Link: <a href="https://teams.microsoft.com/l/meetup-join/19%3ameeting_NTgxM2Y0MGU0OGQ2Ny00OWJILWE1YTMtMmJkNzA4MmYwNWU0%40thread.v2/0?context=%7b%22Tid%22%3a%2293aedbdcc67-4652-aa12-d250a876ae79%22%2c%22Oid%22%3a%224f12e233-9ca9-4234-a6cb-0deb09666cd2%22%7d">https://teams.microsoft.com/l/meetup-join/19%3ameeting_NTgxM2Y0MGU0OGQ2Ny00OWJILWE1YTMtMmJkNzA4MmYwNWU0%40thread.v2/0?context=%7b%22Tid%22%3a%2293aedbdcc67-4652-aa12-d250a876ae79%22%2c%22Oid%22%3a%224f12e233-9ca9-4234-a6cb-0deb09666cd2%22%7d</a></p> <p><b><u>Tenderers must confirm their intention to attend the clarification meeting with the Eskom Representative stating the name, position and contact details of each proposed attendee.</u></b></p> <p><b><u>Please note that though the tender states the clarification meeting is non-compulsory, it is still highly recommended that potential tenderers attend the meeting to get better appreciation of the requirements set herein.</u></b></p> |
| 2.17 Clarification on enquiry documents    | The tenderer will notify the <i>Employer</i> of any clarifications required before the closing time for clarification queries, which is <b>10 working days</b> before the deadline for tender submission.  |
| 2.23 Alternative tenders                   | <p>Alternative tenders <b><i>are allowed</i></b></p> <p>If Alternative tender(s) are allowed, it may be based only on the following criteria and subject to acceptance by the <i>Employer</i>:<br/> <b>Only if it's a title change and the alternative tender meets the minimum content criteria as well as NQF7 minimum requirements</b></p> <p>A different main option and other combinations of secondary option clauses, acceptable to Eskom as the Employer, selected from the NEC Engineering and Construction Contract</p>  |
| 2.25 Conditions of contract                | The conditions of contract will be <b>NEC3 PSC</b>   |
| 2.31 Provision of security for performance | Security for performance is <b><i>not applicable</i></b>   |

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| 3.4 Opening of tenders                   | <p>Tenders will be opened at the same date and time as the tender deadline;</p> <p>Tenders will be opened on:<br/> Place: <b>TENDER ADVICE CENTER (Eskom Retail Park)</b><br/> Date: <b>26 SEPTEMBER 2022</b><br/> Time: <b>10h00</b></p>  |          |        |                        |      |           |     |
|--|--|----------|--------|------------------------|------|-----------|-----|
| 3.5 Prices to be read out                | Prices <b>will not be read out</b>   |          |        |                        |      |           |     |
| 3.9 Basic Compliance                     | <p>Basic compliance for this invitation to tender/ RFP are:</p> <ul style="list-style-type: none"> <li>• Meet the eligibility criteria for a tenderer</li> <li>• Submit one (1) hard copy of the original tender to Eskom</li> <li>• Submit a complete original tender with commercial, financial and technical information</li> <li>• Submission of the mandatory commercial tender returnables as at stipulated deadlines.</li> <li>• Central Supplier Database (CSD) number (MAA.....)</li> </ul>   |          |        |                        |      |           |     |
| 3.10 Mandatory tender returnables        | A tenderer that does <b>not submit mandatory documents/information required</b> as mandatory documents by the required deadlines as stipulated in the Tender Returnable section of the respective Invitation to Tender; <b>will be deemed non-responsive.</b>  |          |        |                        |      |           |     |
| 3.11 Pre-qualification criteria          | Pre-qualification criteria is <b>not applicable</b>  |          |        |                        |      |           |     |
| 3.12 Designated materials and thresholds | Designated material thresholds are <b>not applicable</b>   |          |        |                        |      |           |     |
| 3.13 Functionality requirements          | <p>Functionality requirements are <b>applicable</b></p> <p>The following criteria will be applicable for this transaction under functionality criteria:</p> <table border="1"> <tr> <th>Criteria</th><th>Weight</th></tr> <tr> <td>Technical Requirements</td><td>100%</td></tr> <tr> <td>Threshold</td><td>70%</td></tr> </table> <p>Note:<br/> <b>Please refer to detailed technical evaluation criteria and specification attached for more information.</b></p> <p><b><u>Tenderers who do not meet the threshold for functionality scoring will be disqualified and not be evaluated further</u></b></p> | Criteria | Weight | Technical Requirements | 100% | Threshold | 70% |
| Criteria                                 | Weight   |          |        |                        |      |           |     |
| Technical Requirements                   | 100%   |          |        |                        |      |           |     |
| Threshold                                | 70%  |          |        |                        |      |           |     |
| 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</li> </ul>  |          |        |                        |      |           |     |

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|   | <p>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.</p> <ul style="list-style-type: none"> <li>Unconditional discounts must be taken into account for evaluation purposes;</li> <li>Conditional discounts must not be taken into account for evaluation purposes but should be implemented when payment is effected.</li> </ul> <p>Prices will be scored out of 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"> <li>80/20 (for estimated values above R30 000 and up to R50M inclusive of VAT) or</li> </ul> <p>Either 80/20 or 90/10 will apply should there be a degree of uncertainty on which PPPFA Point allocation system will apply; the lowest acceptable tender will be used to determine the applicable preference system</p> <p>Eskom will then add the score from Pricing and the B-BBEE level together and rank the suppliers from the highest to the lowest.</p>  |
| 3.19 Objective Criteria (if applicable)   | Objective criteria is <b><i>not applicable</i></b>  |
| Contractual Requirements (if applicable ) | <p>Contractual Requirements may include the following :</p> <ul style="list-style-type: none"> <li>SHEQ requirements; and/or</li> <li>Financial statements; and/or</li> <li>SD&amp;L Job Creation</li> <li>NEC3 PSC contract terms and conditions will apply</li> <li>Any other applicable requirement as set in the contract document.</li> </ul> <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 is able to meet the contractual requirements, must be submitted prior to contract award.</b><br/> <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><br/> <b>In the event that there are further documents/actions that are required during execution of the contract, these must be made</b></p> |

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|   | <b>contractual conditions and compliance thereto must be managed in terms of the contract.</b> |
| CIDB Requirements (where applicable for Engineering and Construction Works Contracts) | CIDB Requirements <i>are not applicable</i>  |

**Please note:**

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

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

**For contracts valued above R100 000 0000 (One Hundred Million Rand), including VAT, Eskom is committed to paying suppliers within 60 days of receipt of undisputed invoices.**

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

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

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

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

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

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### 1.3 TENDER RETURNABLES

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

| Reference  | Returnables from supplier  | Returnables mandatory for evaluation purposes and due at tender closing | Returnables mandatory for contract award and due prior to contract award |
|--|--|---|--|
| <b>Basic Compliance</b>  | One (1) hard copy of the tender  | ✓   |  |
| <b>Annexure A</b>  | Acknowledgement Form   | ✓   |  |
| <b>Annexure B</b>  | Tenderers Particulars  | ✓   |  |
| <b>Annexure C</b>  | Integrity Pact Declaration form  | ✓   |  |
| <b>Annexure D</b>  | CPA for local goods/services (if applicable)   | ✓   |  |
| <b>Annexure E</b>  | CPA(IG) for imported goods/services (if applicable)  | ✓   |  |
| <b>Annexure G</b> (applicable for all suppliers including Foreign suppliers) | SBD 1- to be completed and submitted by all tenderers.   |   | ✓  |
| <b>Annexure H</b>  | SBD 6.1- Preference Points Claim Form in terms of PPPFA 2017 regulations   | ✓   |  |
| <b>Annexure I</b>  | SBD 4 – Bidders Disclosure   | ✓   |  |
| <b>Annexure J</b>  | Tax Evaluation Questionnaire   |   | ✓  |
| <b>Annexure K</b>  | Non-Disclosure Agreement (NDA) Vendors   |   | ✓  |
| <b>Annexure L</b>  | Pricing Schedule   | ✓   |  |
| Supplier Development & Localisation (SD&L) Undertaking (if applicable)       | <b>The supplier is required to propose the number of jobs to be created.</b>   |   | ✓  |
| <b>Additional Documents required in event of JV:-</b>                        | 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)  |   | ✓ |
|   | <b>“proof of B-BBEE status level of contributor” means:-</b><br>(a) the B-BBEE status level certificate issued by an authorised body or person; or<br>(b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or<br>(c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act;<br>(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.  |   | ✓ |
| <b>*“proof of B-BBEE status level of contributor” means:-</b><br>(a) the B-BBEE status level certificate issued by an authorised body or person; or<br>(b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or<br>(c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act; | Failure on the part of the supplier to submit <b>“proof of B-BBEE status level of contributor”</b> for purposes of evaluation and scoring by the tender closing will not result in disqualification (if tenderer is otherwise deemed to be responsive/acceptable in all other aspects and it is not a pre-qualification criterion). The tenderer will, however, be scored zero on B-BBEE for purposes of PPPFA scoring and ranking. | ✓ |   |
| <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 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) .<br>Foreign suppliers with no footprint in South Africa, must still complete the SBD1        |   | ✓ |

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|   |  |  |                                       |
|---|--|--|---------------------------------------|
|   | <b>Part B:</b> Annotation: This section is only applicable to suppliers/consultants/contractors that have been certified for an auditable OHS system.<br><br><b>1. Annexure B</b> Is the acknowledgement of <b>Eskom's OHS</b> legal and other requirements form signed and submitted by the tenderer?<br><b>2.</b> ISO 45001 certificate or equivalent<br><b>3.</b> Valid Letter of Good Standing ( <b>COIDA or equivalent</b> )<br><b>4.</b> Covid 19 Management Plan                                  |  | ✓<br><br>✓<br><br>✓<br><br>✓<br><br>✓ |
| <b>QUALITY</b>  |  |  |                                       |
| 1. 240-105658000 (QM 58) Supplier Quality Management: Specification   | Specifying Eskom supplier quality requirements. Tenderer to comply with the selected requirements as per category 4.   |  | ✓                                     |
| 2. 240-68099512 FORM A: Tender & Contract Quality Requirements For QM 58 and Quality Requirements For ISO 9001 Standard | Tenderer to complete (section A and E) and sign it.  |  | ✓                                     |
| 3. 240-12248626 List of Tender Returnables Documentation  | List of Tender Returnables Documentation   |  | ✓                                     |
| 4. 240-126469599 QM 58 Method Statement Template  | Tenderer to compile and submit Quality method statement. The method statement must be based on the scope of service/ work.   |  | ✓                                     |
| <b>Other safety/quality documents as required per scope of works</b>  |  |  | ✓                                     |
| <b>Environmental</b>  | Documents that may be required as per scope of work  |  | ✓                                     |
| <b>Due Diligence</b>  | Audited Financial Statements of the <i>tenderer</i> for the previous 18 months, or to the extent that such statements are not available, for the last year. Tenderers must note that in the case of a joint venture or special purpose vehicle (SPV) especially formed for this tender, audited financial statements for each participant in the JV / SPV is required. Start-up enterprises formed within the last 12 months are not required to send in statements, but if successful with their tender |  | ✓                                     |

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|--|---|---|--|-------|--|--|
|  |   | will be required to send statements for the first year when once available.               |  |       |  |  |
| DOCUMENTS REQUIRED UNDER FUNCTIONALITY/TECHINICAL CRITERIA |   |   |  |       |  |  |
| Technical (required for functionality scoring)             |   | All technical returnables are mandatory for evaluation purposes and due at tender closing |  |       | ✓  |  |
| Item   | Criteria  | Weight  | Subfactor  | Score | Measure/Returnable   |  |
| 1  | Advanced Management & Leadership Development Minimum Requirements | 40  | Interventions at SAQA NQF Level 7 or higher      | 40%   | • SAQA Qualification Number & certificate<br>• Entry level requirements specified, as well as whether RPL is accepted or not.<br>• Academic institution on-line portal and registration requirements specified.  |  |
|  |   |   | Individual intervention modules CPD accredited   | 10%   | • CPD certificates from Eskom approved professional body (eg ECSA)   |  |
|  |   |   | Module coverage of specified conte               | 40%   | • High level curriculum content with brief description of topics covered per module.<br>• In-person contact duration requirements per module specified, with justification where duration is longer than 2 days.   |  |
|  |   |   | Industry recognition of intervention(s) proposed | 5%    | • Self-study time requirements per module specified.   |  |
|  |   |   | Maturity of intervention(s) proposed             | 5%    | • Evidence of how program compares to similar qualifications globally (eg academic ranking of program internationally or endorsement by other academic institution(s))<br><br>• Evidence for how long the interventions have been offered and the number of successful participants to the intervention/programme to date. |  |
| 2  | Flexibility   | 25  | Ability to offer modules in the intervention as  | 30%   | • Modules available as singular courses.   |  |

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|---|---|----|--|---|---|
|   |   |    | <p>singular accredited courses or SLP's</p> <p>Ability to adapt training material to include Eskom Generation case studies &amp; real-life situations.</p> <p>Ability to create new modules or course content for Eskom Generation specific needs.</p> <p>Blended learning adoption indicated and special logistic requirements for using these clearly specified.</p> <p>Eskom accessibility to training material</p> | <p>25%</p> <p>10%</p> <p>15%</p> <p>20%</p> | <ul style="list-style-type: none"> <li>• CPD certificates for such courses.</li> <li>• Indication of adaptable and to what extent content may be modified without losing SAQA/CPD accreditation.</li> <li>• Ability to create new course modules.</li> <li>• Cost to develop such courses.</li> <li>• Resources available to Service provider to develop courses.</li> <li>• Ability to meet tight delivery deadlines.</li> <li>• Blended learning techniques specified and how it is applied.</li> <li>• Logistic requirements for using these technologies indicated.</li> <li>• Learner guides and presentations available to Eskom in electronic format.</li> <li>• Clear indication that Eskom-directed course material developments will be Eskom IP and content provided in edit-able format to Eskom Generation.</li> </ul> |
| 3 | Track Record  | 10 | <p>Track record of presenters and facilitators that will be used.</p> <p>Running the intervention for large corporates</p>   | <p>70%</p> <p>30%</p>                       | <ul style="list-style-type: none"> <li>• CV's of typical presenters and/or facilitators that will be used.</li> <li>• Evidence where the proposed intervention/s was presented or rolled out in a corporate environment.</li> </ul>   |
| 4 | Practical Application of advanced leadership and management skills & techniques | 15 | <p>Extent to which theory is augmented by examples on practical application.</p>   | <p>25%</p> <p>50%</p>                       | <ul style="list-style-type: none"> <li>• Examples of at least 2 modules where this is demonstrated.</li> </ul>  |

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|                                |           |             |   |                                  |  |
|--------------------------------|-----------|-------------|---|----------------------------------|--|
|                                |           |             | <p>Extent to which Action-based learning are deployed.</p> <p>Assignment approach is specified and how assignments will be marked.</p>  | 25%                              | <ul style="list-style-type: none"> <li>Information provided on how learners will be measured on being able to put learning into practice. (Approach taken – ideally an example of approach and outcome expected)</li> <li>Approach described and an example given of the Portfolio of Evidence as a typical outcome to the proposed intervention(s).</li> </ul>                                      |
| 5                              | Logistics | 10          | <p>Ability to deliver at least 3 full-on interventions with all modules indicated in the 36-month contract duration period.</p> <p>Ability to present intervention modules as “master classes” on an ad hoc basis.</p> <p>Costing</p> | <p>50%</p> <p>30%</p> <p>20%</p> | <ul style="list-style-type: none"> <li>Ability to deliver clearly specified and indicated.</li> <li>Ability to deliver at least 3 “master classes” per module on ad hoc basis indicated, with any specific requirements from Service Provider clearly indicated.</li> <li>T&amp;S costing in line with Eskom specified rates indicated.</li> <li>Costing includes marking of assignments.</li> </ul> |
| <b>Total Technical Scoring</b> |           | <b>100%</b> |   |                                  |  |
| <b>Threshold</b>               |           | <b>70%</b>  |   |                                  |  |

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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:

|    |  |
|----|--|
| 1. |  |
| 2. |  |
| 3. |  |

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

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

Or: Incorrect or incomplete for the following reasons: ☐

---



---



---

### **Cataloguing Acknowledgement:**

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

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

---



---



---

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

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

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

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

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

Contact details of contact person:

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

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## **ANNEXURE B**

### **TENDERER'S PARTICULARS**

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

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

Please complete the following:


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

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

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

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

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

|     |  |    |  |
|-----|--|----|--|
| YES |  | NO |  |
|-----|--|----|--|


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

8.1 Confirm if you intend sub-contracting

|     |  |    |  |
|-----|--|----|--|
| YES |  | NO |  |
|-----|--|----|--|

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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 |  | NO |  |
|-----|--|----|--|

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

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

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

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

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

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

|     |  |    |  |
|-----|--|----|--|
| YES |  | NO |  |
|-----|--|----|--|

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

|     |  |    |  |
|-----|--|----|--|
| YES |  | NO |  |
|-----|--|----|--|

#### A. Single tenderers

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


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

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

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

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## 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.

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

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## **ANNEXURE C**

### **INTEGRITY DECLARATION FORM**

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

#### **1. DECLARATION OF INTEREST**


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

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

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

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| Full Name & Capacity/<br>Position within tenderer (e.g.<br>employee/Director/member/<br>owner/shareholder) | Identity<br>Number | Confirm and provide<br>details (including<br>employee number) if<br>you are a State/State<br>owned entity<br>employee/contractor/<br>director. | Full Names &<br>Capacity/Position of<br>Eskom employee/<br>director/ consultant<br>and details of the<br>relationship or<br>interest (marital/<br>familial/personal/<br>financial etc.) | To your<br>knowledge<br>is this<br>person<br>involved in<br>the<br>evaluation/<br>adjudication/<br>negotiation<br>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 |
|-------|--|-----|----|
| 1.1   | <p>Is the <i>tenderer/s (or any of its directors/members/shareholders)</i> listed on National Treasury's Database of Restricted Suppliers as companies/persons prohibited from doing business with the public sector</p> <p><b><i>[Note: Companies/persons who are listed on the Database were informed in writing of this restriction by the Authority/Accounting Officer of the institution that imposed the restriction after the audi alteram partem rule was applied].</i></b></p> <p>The Database of Restricted Suppliers can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>).</p> |     |    |
| 1.2   | <p>Is the <i>tenderer/s (or any of its directors / members / shareholders)</i>? listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combatting of Corrupt Activities Act (No 12 of 2004)</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>).</p>  |     |    |
| 1.3   | Was the <i>tenderer/s (or any of its directors/members/shareholders)</i> convicted by a court of law (including a court outside South Africa) for fraud and/or corruption with respect to the procurement/tendering processes/procedures during the past five years?   |     |    |
| 1.3.1 | Provide details.   |     |    |
| 1.4   | Was the <i>tenderer/s(or any of its directors/members/shareholders)</i> prohibited from doing business with any International Financial Development/funding Agency or Lending Institution  |     |    |
| 1.5   | 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?   |     |    |

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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>                                     |  |

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### **Joint Ventures**

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

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

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

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

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

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

Tenderers shall comply with the following requirements:

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

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

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

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

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

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


Additional/Alternative Offers must be clearly indicated as such

##### **3. ESKOM'S PREFERRED INDEX LIST**

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

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

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

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

#### 5. NUMBER OF FORMULAE & INDICES

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

#### 6. CPA FIXED PORTION

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

#### 7. BASE DATE

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

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## 8. CPA FOR PROFESSIONAL SERVICES

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

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

CPA will not be applicable for the first 12 months (fixed) of the contract.

No fixed portion is mandatory.

Signed

Date

Name

Position


Tenderer

**Table 1: Preferred Local Index List** -this list of indices needs is relevant to the commodity.

| Labour  | Commodities  | Processed material   | Transport                          | Others   |
|---|--|--|------------------------------------|--|
| <b>Labour general (hourly paid)</b><br><br>SEIFSA, C3, actual labour cost     | <b>Steel</b><br><br>StatsSA, P0142.1 Table 2, basic iron and steel | <b>Mechanical engineering material</b><br><br>SEIFSA, G-1, mechanical engineering material | SEIFSA, L-2(A), road freight costs | StasSA, PO141 <b>CPI</b> (Headline) all items<br><br>OR<br><br>SEIFSA, D-3 (CPI)                               |
|   | <b>Copper</b><br><br>SEIFSA, F, copper metric ton                  | <b>Electrical engineering material</b><br><br>SEIFSA, G-1, electrical engineering material |                                    |  |
| <b>Labour general</b><br><br>SEIFSA, C3 (a), actual labour cost (field force) | <b>Aluminium</b><br><br>SEIFSA, R, aluminium                       |  |                                    | StasSA, PO142.1), <b>PPI</b><br><br><ul style="list-style-type: none"> <li>Final Manufactured Goods</li> </ul> |

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|                                     |  |  |  |  |
|-------------------------------------|--|--|--|--|
| where subsistence allowance is paid |  |  |  | Or <ul style="list-style-type: none"> <li>Intermediate Manufactured Goods OR</li> <li>SEIFSA Table U Producer Price Index (PPI) - final manufactured Goods OR Intermediate Manufactured Goods</li> </ul> |
|                                     |  |  |  |  |

**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)<br><br>National Statistical Institute, Country-specific PPI |
|   | LME, Copper                                | National Statistical Institute, Country-specific electrical engineering material |   |   |
|   | LME, aluminium                             |  |   |   |
|   | LME, zinc                                  | National Statistical Institute, Country-specific building and                    |   |   |
|   | LME, lead                                  |  |   |   |

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|  |  |                       |  |  |
|--|--|-----------------------|--|--|
|  |  | construction material |  |  |
|--|--|-----------------------|--|--|

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

## **ANNEXURE E**

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

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

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

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.

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- Service related payments are excluded from this option;

**Applicable(Y/N) or**

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

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

Please note:

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

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

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

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

Fixed ZAR pricing

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

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

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

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

#### **PART 2: EXCHANGE RATES**

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

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

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

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

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

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

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

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

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


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

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

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

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

#### 4.2 EXPATRIATE LABOUR METHOD

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

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

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

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

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

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


- 1 When the percentage increase or decrease between two indices/prices/tariffs is calculated, the earlier figure shall be taken as the base.
- 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 G

## SBD 1

### PART A INVITATION TO BID

|  |   |  |                                     |   |  |
|--|---|--|-------------------------------------|---|--|
| <b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)</b>   |   |  |                                     |   |  |
| BID NUMBER:  |   | CLOSING DATE:  |                                     | CLOSING TIME:   |  |
| DESCRIPTION  |   |  |                                     |   |  |
| <b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>  |   |  |                                     |   |  |
| BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)  |   |  |                                     |   |  |
|  |   |  |                                     |   |  |
|  |   |  |                                     |   |  |
|  |   |  |                                     |   |  |
|  |   |  |                                     |   |  |
| <b>SUPPLIER INFORMATION</b>  |   |  |                                     |   |  |
| NAME OF BIDDER   |   |  |                                     |   |  |
| POSTAL ADDRESS   |   |  |                                     |   |  |
| STREET ADDRESS   |   |  |                                     |   |  |
| TELEPHONE NUMBER   | CODE  |  | NUMBER                              |   |  |
| CELLPHONE NUMBER   |   |  |                                     |   |  |
| FACSIMILE NUMBER   | CODE  |  | NUMBER                              |   |  |
| E-MAIL ADDRESS   |   |  |                                     |   |  |
| VAT REGISTRATION NUMBER  |   |  |                                     |   |  |
|  |   |  |                                     |   |  |
|  | TCS PIN:  |  | <b>OR</b>                           | CSD No:   |  |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]   | <input type="checkbox"/> Yes<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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|  |  |  |   |
|--|--|--|---|
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?                            | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES ENCLOSE PROOF] | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No<br>[IF YES ANSWER PART B:3 BELOW ] |
| SIGNATURE OF BIDDER  | .....  | DATE   |   |
| CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.) |  |  |   |
| TOTAL NUMBER OF ITEMS OFFERED  |  | TOTAL BID PRICE (ALL INCLUSIVE)  |   |
| <b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>   |  | <b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>                         |   |
| DEPARTMENT/ PUBLIC ENTITY  |  | CONTACT PERSON   |   |
| CONTACT PERSON   |  | TELEPHONE NUMBER   |   |
| TELEPHONE NUMBER   |  | FACSIMILE NUMBER   |   |
| FACSIMILE NUMBER   |  | E-MAIL ADDRESS   |   |
| E-MAIL ADDRESS   |  |  |   |

## PART B TERMS AND CONDITIONS FOR BIDDING

|  |
|--|
| <b>1. BID SUBMISSION:</b>  |
| 1.1. 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.   |
| <b>2. TAX COMPLIANCE REQUIREMENTS</b>  |
| 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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## Annexure H

## SBD 6.1

### PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

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

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

#### 1. GENERAL CONDITIONS

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

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

1.2 Points for this bid shall be awarded for:

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

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


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

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

1.5 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to

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preferences, in any manner required by the purchaser.

## 2. DEFINITIONS

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

## 3. POINTS AWARDED FOR PRICE

### 3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

**80/20**

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

Where

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

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Pt = Price of bid under consideration

Pmin = 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:-

#### 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 20 points)  
(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

#### 7. SUB-CONTRACTING

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


(**Tick applicable box**)

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

- 7.1.1 If yes, indicate:

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- 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:

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

#### 8. DECLARATION WITH REGARD TO COMPANY/FIRM

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

☐ Partnership/Joint Venture / Consortium

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- ☐ 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:

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

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- (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution.

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

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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**

2.3.1 If so, furnish particulars:

.....  
.....

### 3 DECLARATION

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

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

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

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

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

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


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

---

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

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

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

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

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

|           |                |
|-----------|----------------|
| .....     | .....          |
| Signature | Date           |
| .....     | .....          |
| Position  | Name of bidder |

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