	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ESKOM HOLDINGS SOC LTD

INVITATION TO TENDER

FOR

DESIGN, PROCUREMENT AND CONSTRUCTION OF UNIT 1-6 AND OUTSIDE PLANT HEAT VENTILATION AIR CONDITIONING AT MATLA POWER STATION

Tender number	MPMAT10620PS
Issue date	20 March 2023
Closing date and time	12 April 2023 at 10h00
Tender validity period	90 days from the closing date and time
Clarification meeting	<p>Date: 29 March 2023 Time: 10:00am Venue: Matla Power Station, GCD, Thandanani 1 Boardroom</p> <p>For access purposes, Tenderers must confirm their intention to attend the meeting with the Eskom representative via email: lebepej@eskom.co.za by no later than 24 March 2023 stating name and surname, Identity Number, email address and company name of each proposed attendee.</p>
Tenders are to be delivered to the following address on the stipulated closing date and time:	<p>Eskom Holdings SOC Limited 10 Smuts Avenue Tender Office Ground Floor Emalahleni</p>

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		Effective Date	February 2023		
		Review Date	February 2028		

Invitation to Tender

Eskom Holdings SOC Ltd (hereinafter “Eskom”) invites you to submit a *Tender* for Design, Procurement and Construction of Unit 1-6 and Outside Plant Heat Ventilation Air Conditioning at Matla Power Station.

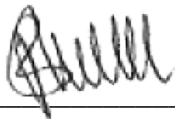
The enquiry documents are supplied to you on the following basis:

1. Free of charge

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

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

Yours faithfully,



Raisibe Mphahlele

Procurement Manager

Procurement & Supply Chain Management (P&SCM)

Date: 20 March 2023

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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

Number	Description	Annexure/to be downloaded and attached	Attached (Y/N/ N/A)
1.1.1	*Acknowledgement form	Annexure A	Y
1.1.2	*Tenderer's particulars	Annexure B	Y
1.1.3	*Integrity Declaration Form (refer to www.eskom.co.za for the Supplier Integrity Pact that suppliers are required to download and read)	Annexure C	Y
1.1.4	*CPA Requirements for Local Goods/Services	Annexure D	Y
1.1.5	*CPA(IG) for Foreign Goods/Services (if applicable)	Annexure E	Y
1.1.6	SBD 6.2- Declaration Certificate for Local Production and Local Content (only applicable if designated materials are included). Annexure C-Local Content Declaration-Summary Schedule Annexure D-Imported Content Declaration – Supporting Schedule to Annexure C Annexure E-Local Content Declaration-Supporting Schedule to Annexure C	Annexure F1 Annexure F2 Annexure F3 Annexure F4	Y
1.1.7	*SBD 1 -Invitation to Bid must be filled out by all tenderers and submitted with the tender at tender submission deadline	Annexure G	Y
1.1.8	*SBD 6.1- Preference Points Claim Form in terms of PPPFA 2022 regulations	Annexure H	Y
1.1.9	*SBD 4 – Bidders Disclosure	Annexure I	Y
1.1.10	Tax Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE	Not Applicable.	
1.1.11	Reverse e-auction training acknowledgement form (if applicable)	Not Applicable.	
1.1.12	Reverse e-auction process (if applicable)	Not Applicable.	

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

1.1.13	Contract Skills Development Goals (CSDG) [Applicable]	To be downloaded from CIDB (Form A1 List of Recognised Skills Development Agencies, Form A2 Baseline Training Plan, Form A3 Project Interim Report, Form A4 Supervisor Agreement, Form A5 Project Completion Report.	Applicable
1.1.14	Contract Participation Goals (CPG) [Not applicable]	To be downloaded from CIDB (Annexure A- Targeted Enterprise Declaration Affidavit; Project Interim Report, Project Completion Report and Declaration)	Not applicable

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

Clause Number from Standard Conditions of Tender	Tender Data
1.1 Parties	<p>The <i>Employer</i> is Eskom Holdings SOC Ltd</p> <p>The Eskom <i>Representative</i> is: Name: Julia Lebepe Tel: 017 612 6022 E-mail: lebepej@eskom.co.za</p>
1.3 Enquiry documents	<p>The Invitation to tender number is: MPMAT10620PS.</p> <p>See the content list above for the enquiry documents.</p>
1.4 Type of Invitation to Tender	<p>This invitation to tender is</p> <ol style="list-style-type: none"> 1. An open Invitation to tender.
1.6 Eskom's rights to accept or reject any tender	<p>The tender shall be for the whole 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 ineligible to submit a tender if</p> <ol style="list-style-type: none"> 1. Tenderers have the nationality of a country on any international sanctions list. A tenderer shall be deemed to have the nationality of a country if the tenderer is a national or is constituted, incorporated, or registered and operates in conformity with the provisions of the laws of that country. This criterion shall also apply to the determination of the nationality of proposed subcontractors or suppliers for any part of the Contract including related services. 2. Tenderers submit more than one tender either individually or as a partner in a joint venture (JV) or consortium; 3. Tenders submitted by a JV or consortium where the JV/consortium agreement does not explicitly state that the parties of the JV or consortium shall be jointly and severally liable for the execution of the Contract in accordance with the Contract terms; 4. A Tenderer must not have a conflict of interest. All Tenderers found to have a conflict of interest shall be disqualified. A Tenderer may be considered to have a conflict of interest with one or more parties in this [tendering process, if : <ol style="list-style-type: none"> 1. (a)they have a controlling partner/majority shareholder in common; or 2. (b)they have a relationship with each other, directly or through common third parties, that puts them in a

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	<p>position to have access to information about or influence on the tender of another Tenderer, or influence the decisions of the Employer regarding this bidding process;</p> <ol style="list-style-type: none"> 5. Tenders signed by non- authorized persons; 6. Where the tenderers are not registered on National Treasury's Central Supplier Database (except Foreign Suppliers); 7. Any tenderer that is restricted by National Treasury ; 8. Any tenderer on the Tender Defaulters list; and 9. A tenderer that sub-contracts 100% Scope of Work. <p>Ineligible tenderers will be disqualified.</p>
2.2 -2.5 Tender Closing	<p>The deadline for Tender submission is: Date: 12 April 2023 Time: 10:00am</p> <p>Late Tenders will not be accepted.</p> <p>Tenders are to be submitted to the Eskom <i>tender box</i> at the following physical address:</p> <p>THE TENDER OFFICE NO.10 SMUTS AVENUE GROUND FLOOR EMALAHLENI 1035</p>
2.9 Copy of original tender	<p>The tenderer must submit the tender as a complete original tender, plus one (1) hard copy of the original tender at tender submission deadline. Eskom may also require that one (1) additional complete soft copy (Preferably USB) of the original tender is required in electronic format.</p> <p>Where a Tenderer does not submit 1 hard copy of the original tender at tender submission deadline, the tenderer will be disqualified.</p>
2.13 Tender Validity Period	The tender validity period is 12 weeks .
2.16 Site/clarification meetings	<p>A non-compulsory clarification meeting/site visit with representatives of the Employer will take place as follows: Date: 29 March 2023 Time: 10:00am Venue: Matla Power Station, GCD, Matla Refurbishment Project, Thandanani 1 Boardroom.</p>

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	For access purposes, Tenderers must confirm their intention to attend the meeting with the Eskom representative via email: lebepei@eskom.co.za by no later than 24 March 2023 stating name and surname, Identity Number, email address and company name of each proposed attendee.
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 5 (five) working days before the deadline for tender submission.
2.23 Alternative tenders	Alternative tenders are not allowed .
2.31 Provision of security for performance	<p>Performance Bond is required, the names of two financial institutions that the tenderer will approach must be submitted with the tender, chosen from Eskom's list of pre-vetted guarantors. The list will be published on the Eskom Tender Bulletin.</p> <p>The following bonds are required for this enquiry: -</p> <ol style="list-style-type: none"> 1. Performance Bond; and 2. SDL&I Bond.
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:</p> <p>Place: Eskom Tender Office, 10 Smuts Avenue, Ground Floor, Emalahleni.</p> <p>Date: 12 April 2023</p> <p>Time: 10:00am</p>
3.5 Prices to be read out	Prices will not be read out .
3.9 Basic Compliance	<p>Basic compliance for this invitation to tender are:</p> <ol style="list-style-type: none"> 1. Meet the eligibility criteria for a tenderer; 2. Submit one (1) hard copy of the original tender to Eskom; 3. Submit a complete original tender with commercial, financial and technical information; 4. Submission of the mandatory commercial tender returnables as at stipulated deadlines; and <p>Central Supplier Database (CSD) number (MAA.....).</p>

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		Effective Date	February 2023		
		Review Date	February 2028		

3.10 Mandatory tender returnables	Technical Mandatory Requirements.			
	No'	Mandatory Technical Criteria Description (Yes/No)	Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria
	1.	Has the Tenderer confirmed that all major equipment and devices offered are of proven technology; supplied by the Original Equipment Manufacturers (OEMs) and have a minimum duration of five years since installation?	Tender Returnable: <ul style="list-style-type: none"> Submit OEM letter stating agreement letter between supplier and OEM on the supply of HVAC (Chillers and Cooling Towers). 	To ensure the equipment (Chillers and Cooling Towers) have a back-up from OEMs.
	2.	Has the Tenderer confirmed that they have a track record of five completed projects as a minimum: for construction, commissioning and testing of HVAC systems? a) Submit a written confirmation stating that the supplier as completed at least 5 projects in HVAC systems.	Tender Returnable: <ul style="list-style-type: none"> Written confirmation letter stating at least 5 projects completed by the supplier in HVAC systems with Project Values complete with traceable references. Award letters or completion certificates to be provided. 	Previous similar work experience and key personnel allocated to this project should be documented. This is to ensure that the Tenderer has the capability to undertake the Works.
	3.	Professional Engineers who will sign off the design and installation once commissioned and completed.	Tender Returnable: <ul style="list-style-type: none"> ECSA registered engineers' certificates to be attached. 	Mechanical heating ventilation and air conditioning systems are to be designed and signed off by a

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
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	<ul style="list-style-type: none">○ Submit written commitments or declaration confirming that all design work shall be signed off by Pr. Eng. (Mechanical, Electrical, C&I, and Civil).		professional ECSA registered Engineer/Technologist.																
	A tenderer that does not submit mandatory documents/information required in mandatory documents by the required deadlines as stipulated in the Tender Returnable section of the respective Invitation to Tender; will be deemed non-responsive.																		
3.13 Functionality requirements	<p>Functionality requirements <i>are applicable</i>.</p> <p>The following criteria will be applicable for this transaction under functionality criteria:</p> <table><tr><th>Criteria</th><th>Weight</th></tr><tr><td>HVAC General Works</td><td>30</td></tr><tr><td>Technical Qualifications and Deviations</td><td>10</td></tr><tr><td>General</td><td>20</td></tr><tr><td>Electrical Requirements</td><td>20</td></tr><tr><td>C & I and BMS Requirements</td><td>20</td></tr><tr><td>Total</td><td>100</td></tr><tr><td>Threshold</td><td>70%</td></tr></table> <p>Tenderers who do not meet the threshold for functionality scoring will be disqualified and not be evaluated further.</p>			Criteria	Weight	HVAC General Works	30	Technical Qualifications and Deviations	10	General	20	Electrical Requirements	20	C & I and BMS Requirements	20	Total	100	Threshold	70%
Criteria	Weight																		
HVAC General Works	30																		
Technical Qualifications and Deviations	10																		
General	20																		
Electrical Requirements	20																		
C & I and BMS Requirements	20																		
Total	100																		
Threshold	70%																		
3.15 Evaluation of price	<p>Prices will be evaluated as follows:</p> <ol style="list-style-type: none">1. Inclusive of VAT;2. Making the specified correction for arithmetical errors;3. Excluding contingencies in any bill of quantities or activity schedule;4. Making an appropriate adjustment for any other acceptable variations, deviations, or alternative tenders submitted;5. Making a comparison of the Net Present Value of each adjusted tender based on the tendered programme (if provided) and prices, on the estimated effect of Price Adjustment Factors and rate of exchange fluctuations (if applicable) and on other evaluation parameters relating to uncertainty and risk, where applicable; <p>Unconditional discounts must be taken into account for evaluation purposes; and</p>																		

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		Effective Date	February 2023		
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	<p>Conditional discounts must not be taken into account for evaluation purposes but should be implemented when payment is affected.</p> <p>Prices will be scored out of 90 points.</p>																		
3.17 Evaluation of Specific Goals	<p>Specific goals will be scored out of 10 points in accordance with PPPFA.</p> <p>If a tenderer fails to meet Specific goals and submit proof, the tenderer will not be disqualified. However, be awarded 90 points for price and will score 0 points for Specific goals (out of 10).</p> <p>Note:</p> <p>Failure on the part of the supplier to submit supporting documents/proof of specific goals for purposes of evaluation and scoring by enquiry closing will not result in disqualification (if tenderer is otherwise deemed to be responsive/acceptable in all other aspects). The tenderer will, however, be scored zero for Specific goals for purposes of PPPFA scoring and ranking.</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> <p>1. 90/10 for tender with a rand value above R50 million inclusive of VAT.</p> <p>Eskom will then add the score from Pricing and Specific goals together and rank the suppliers from the highest to the lowest.</p>																		
3.19 Objective Criteria	<p>Objective criteria are applicable.</p> <p>Compliance to Objective criteria is Mandatory.</p> <p>Failure to comply with Objective will render the tender non-responsive.</p> <p>The following objective criteria apply:-</p> <ul style="list-style-type: none">Designated material and thresholds are applicable. <p>If applicable stipulate which materials are identified as designated materials and what thresholds the tenderers must meet in order to be evaluated further.</p> <table><tr><th>Commodity</th><th>Components</th><th>Local Content Threshold</th></tr><tr><td>Fabricated Structural Steel</td><td>Fabricated Structural Steel</td><td>100%</td></tr><tr><td>Pumps</td><td>Pumps</td><td>70%</td></tr><tr><td>Piping</td><td>Pipes and Fittings</td><td>100%</td></tr><tr><td>Valves</td><td>Valves</td><td>70%</td></tr><tr><td>Electrical cables</td><td>Cabling</td><td>90%</td></tr></table>	Commodity	Components	Local Content Threshold	Fabricated Structural Steel	Fabricated Structural Steel	100%	Pumps	Pumps	70%	Piping	Pipes and Fittings	100%	Valves	Valves	70%	Electrical cables	Cabling	90%
Commodity	Components	Local Content Threshold																	
Fabricated Structural Steel	Fabricated Structural Steel	100%																	
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Piping	Pipes and Fittings	100%																	
Valves	Valves	70%																	
Electrical cables	Cabling	90%																	

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

	PPE	Reflector Vests, Jackets, Boots, Textiles, Clothing, Leather & Footwear, etc.	100%
	<p>Mandatory returnables for Contract Award:</p> <ul style="list-style-type: none"> • (F1) - SBD 6.2 Declaration Form; • (F2) - Annexure C (Local Content Declaration-Summary Schedule; • (F3) - Annexure D-Imported Content Declaration – Supporting Schedule to Annexure C; and • (F4) - Annexure E-Local Content Declaration- Supporting Schedule to Annexure C. <p>NB: If the required input materials cannot be wholly sourced from South Africa, bidders should request and obtain a written exemption letter from the DTI. The exemption letter should then be submitted, and approvals obtained prior to the closure of the bid(s). The DTI together with the procuring organ of state and the winning bidder will consider the exemption on a case-by-case basis.</p> <p>Tenderers need to complete and submit Annexure F1-F4 hereto as evidence of compliance with this requirement.</p> <p>The dti has appointed SABS as the official verification agency for local content in terms of designated products.</p> <p>A tender that fails to meet the minimum stipulated threshold for local production and content will not be justified for award.</p> <ul style="list-style-type: none"> • Valid B-BBEE certificate issued by an authorized body or person; a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; any other requirement prescribed in terms of the Broad-Based Black Economic. • NIPP Requirements are not applicable <p>Eskom will implement the NIPP requirement, which determines that the contractor/supplier has to contact the Department of Trade, Industry and Competition (dtic) to arrange for support; and development of local businesses. Eskom is required to inform the tenderers of this requirement. NIPP will only be applicable for contracts with an FGN component or content of USD 5 million or more.</p> <ul style="list-style-type: none"> • CIDB Contract Participation Goal (CPG) is not applicable. 		

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Contractor shall achieve in the performance of the contract the Contract Participation Goals (CPG) relating to the engagement of targeted enterprises as established in the CIDB Standard for Indirect Targeting for Enterprise development through Construction Works Contract published in GN No. 36190 of 25 February 2013). Contract Participation Goals is only applicable in Grade 7-9 General Building (GB) and Civil Engineering (CE) contracts where the contract duration is 6 months or more.

- CIDB Contract skills development goals (CSGD) **are applicable.**

Contractor shall achieve in the performance of the contract the CSDG established in the CIDB Standard for Developing Skills through Infrastructure contracts (published in GGN 36760 of March 2020).
CSDG is applicable to all classes of works exceeding R60 M and where the contract duration is 12 months or more or to Professional Services/Service contract/order where the estimated contract exceeds R5M and where the contract duration is 12 months or more].

CIDB Skills Development Goals (CSDG)

Skills Type	Number of learners	Intake	Outcome
Mechanical or Electrical Artisans	6	N3 Mechanical or electrical for artisans	Trade test Certificate
Safety Officer in a Construction Environment	3	Qualified Safety officer	SACPCMP Registration

Note:
The above-mentioned Skills are a guideline. The actual skills/trade type may be negotiated. However, expenditure of 0.25% of the Acceptable Contract Amount in accordance with the CIDB CSDG is a **Condition for Contract Award.**

Please note:-

- Eskom reserves the right to award to a tenderer who may not be the highest scoring/highest ranked tenderer, in line with Section (2) (1) (f) of the PPPFA**
- Functionality and elements of Contractual requirements must not be used as objective criteria.**

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3.20 Reverse e-auction (if applicable)	<p>Reverse e-auction is not applicable.</p> <p>Please note:- Reverse e-auction is an electronic price and preference point system (aligned to PPPFA) that aims to achieve the most competitive prices. Eskom reserves the right to utilize reverse e-auction in certain enquiries. Where reverse e-auction is utilized in a specific enquiry this will be indicated in the respective enquiry and the relevant reverse e-auction supporting documents will form part of the enquiry. The Tenderers will be required to submit a complete tender but without prices. Where a supplier includes prices in their tender; these prices will not be considered and will be disregarded.</p>
Contractual Requirements (if applicable)	<p>Contractual Requirements may include the following:</p> <ol style="list-style-type: none"> 1. SHE requirements; 2. Quality Requirements; 3. Financial statements; 4. Planning and Scheduling requirements; 5. SDL&I Requirements; and 6. Criminal Clearance/Checks for Contractors Accessing Power Stations (NKP). <p>Please Note: Contractual requirements are not evaluation criteria. They are required to be met and assessed after the evaluation and ranking of the tenders. Proof that the highest ranked tenderer/ tenderer recommended for award (on the basis of objective criteria) is able to meet the contractual requirements, must be submitted prior to contract award.</p> <p>Failure to meet “Contractual Requirements “by the stipulated deadlines; may result in the tenderer being regarded as non-responsive and ineligible for contract award.</p>
2.25 Contractual Condition	<p>The conditions of contract will be the NEC 3 ECC.</p> <p>The recommended supplier shall submit all the documentation (Form A2 Baseline Training Plan, Form A3 Project Interim Report, Form A4 Supervisor Agreement, Form A5 Project Completion Report) that may be required as returnables after contract award as stipulated by Clause 4 of the Contract Skills Development Goals Standard (published in GGN 36760 of March 2020).</p> <p>The recommended supplier shall submit all the documentation (Annexure A-Targeted Enterprise Declaration Affidavit; Project Interim</p>

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		Effective Date	February 2023		
		Review Date	February 2028		

	<p>Report, Project Completion Report and Declaration) that may be required as returnables after contract award and as stipulated by Clause 3.3 of the Standard for Indirect Targeting for Enterprise Development through Construction Works Contract (published in GGN 36190 of 25 February 2013).</p> <p>In the event that there are further documents/actions that are required during execution of the contract, these must be made contractual conditions and compliance thereto must be managed in terms of the contract.</p>
<p>CIDB Requirements (where applicable for Engineering and Construction Works Contracts)</p>	<p>CIDB Requirements are applicable.</p> <ol style="list-style-type: none"> It is estimated that tenderers must have a Construction Industry Development Board (CIDB) contractor grading of 9ME. Joint ventures are eligible to submit tenders provided that :- <ol style="list-style-type: none"> every member of the Joint venture (JV) is registered with the cidb; the lead partner has a contractor grading designation in the 9ME class of construction work; or not lower than one level below the required grading designation in the class of works construction works under consideration and possesses the required recognition status; the combined contractor grading designation calculated in accordance with the cidb regulations is equal to or higher than a contractor grading designation determined in accordance with the sum tendered for a or 9ME* class of construction work or a value determined in accordance with Regulations 25 (1B) or 25 (7A) of the cidb Regulations. <p>Please note:</p> <p>That only those tenderers who are registered with the Construction Industry Development Board or are capable of being so registered within twenty-one (21) working days from the closing date for submission of tenders in a contractor grading designation as stipulated in the tender data and determined in accordance with the best estimated value of the scope of works herein are eligible to submit tenders.</p> <p>Employer (Eskom) must within 21 working days from date when contractors offer to perform a construction works contract is accepted in writing; register and publish the award of all contracts equal to or exceeding R10 M inclusive of VAT.</p>

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

3. Contract Skills Development Goals (CSDG) Requirements are applicable.

3.1 The CSDG applicable to this tender is in terms of the Engineering and Construction Works contract with respect to the **9ME** class of works, where only one class of construction works is applicable] and the applicable percentage is 0.25 % and is contained in the relevant BOQ/Pricing schedule attached.

Please note:

Contractor shall achieve in the performance of the contract the CSDG established in the CIDB Standard for Developing Skills through Infrastructure contracts (published in GGN 36760 of March 2020).

CSDG is applicable to all classes of works exceeding R60 M and where the contract duration is 12 months or more or to Professional Services/Service contract/order where the estimated contract exceeds R5M and where the contract duration is 12 months or more.

4. Contract Participation Goals is **not applicable**.

Please note:

Contractor shall achieve in the performance of the contract the Contract Participation Goals (CPG) relating to the engagement of targeted enterprises as established in the CIDB Standard for Indirect Targeting for Enterprise development through Construction Works Contract (published in GN No. 36190 of 25 February 2013).

Contract Participation Goals is only applicable in Grade 7-9 General Building (GB) and Civil Engineering (CE) contracts where the contract duration is 6 months or more.

Construction Works contracts in which at least 25% of the main contract could reasonably be expected to be sub-contracted out in one or more of the following classes:-

1. Civil Engineering (CE);
2. Electrical Engineering Work (EB);
3. General Building Works (GB); and
4. Mechanical Engineering (ME).

The Contractor shall engage targeted enterprise/s in the performance of the contract to the extent that at least 5 % contract participation goal is achieved.

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

The contractor shall determine the contract skills participation goals expressed in Rands which shall not be less than the contract amount multiplied by a percentage factor.

Please note:

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

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

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

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

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

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

“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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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

1.3 TENDER RETURNABLES

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

NOTE:

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

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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

Reference	Returnable From Suppliers	Returnable required at Tender closing (disqualifiable)*	Returnable required at Tender closing. (Non-disqualifiable) **	Returnable required prior to Contract Award.
Basic Compliance	One (1) hard copy of the tender	✓		
Annexure A	Acknowledgement Form		✓	
Annexure B	Tenderers Particulars		✓	
Annexure C	Integrity Pact Declaration form		✓	
Annexure D	CPA for local goods/services (if applicable)	✓		
Annexure E	CPA(IG) for imported goods/services (if applicable)	✓		
Annexure F1-F4	SBD 6.2 -Declaration certificate for local production and content and Annexures C, D, E			✓
Annexure G (applicable for all suppliers including Foreign suppliers)	SBD 1- to be completed and submitted by all tenderers.			✓
# Annexure H	SBD 6.1- Preference Points Claim Form in terms of PPPFA 2022 regulations		✓	
Annexure I	SBD 4 – Bidders Disclosure		✓	
Reverse e-auction training acknowledgement form		Not Applicable		
Additional Documents required in event of JV:-	Letter of intent to form a JV/consortium or Valid joint venture agreement confirming the rights and obligations of each of the joint venture partners and their profit-sharing ratios.		✓	
	Separate written confirmation that the joint venture will operate as a single business entity (incorporated) for the duration of the contract or this may be included as an obligation within the JV agreement.		✓	
	# proof of compliance to the stipulated Specific goals.			

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

	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.			✓
# Specific Goals	Failure on the part of the supplier to submit “ proof of specific goals for purposes of evaluation and scoring by the tender closing will not result in disqualification (if tenderer is otherwise deemed to be responsive/acceptable in all other aspects). The tenderer will, however, be scored zero for Specific goals for purposes of PPPFA scoring and ranking.			
Tax Clearance Certificates	A certified copy of a tax clearance certificate is still required by Foreign suppliers (with a footprint in South Africa- but who are not on CSD and have not provided a SARS pin number) and Local suppliers (who have not provided their SARS e-filing PIN number for verification by Eskom and/or their CSD profile / CSD number) . Foreign suppliers with no footprint in South Africa, must still complete the SBD1 document, however no proof of tax compliance is required.			✓
Tax Evaluation Questionnaire (if services contract and was included as annexure)	Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE.	Not Applicable		
Compliance with Employment Equity Act	To the extent that the tenderer falls within the definition of a “designated Employer” as contemplated in the Employment Equity Act 55 of 1998, the tenderer is required to furnish the Employer with proof of compliance with the Employment Equity Act, including proof of submission of the Employment Equity report to the Department of Labour. (South African tenderers only).			✓
CIDB 9ME (Mechanical Engineering)	Valid proof of the required cidb grading designation for the main contractor; JV and /or sub-contractor as may be required in the tender data at tender closing deadline or within 21 working days from the closing date of submission of tenders if this is agreed with the Employer.		✓	
NEC 3 ECC Documentation	Completed NEC pricing schedule and contract data.	✓		
Additional documents required (ECSA/ SACPCMP/CVs/ permits/licenses/ specific		✓		

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

registration documents (if applicable to scope of work)				
	DOCUMENTS REQUIRED UNDER CONTRACTUAL REQUIREMENTS (WHERE CONTRACTUAL REQUIREMENTS ARE STIPULATED)			
Safety	<p>COIDA - Original certificate of good standing or proof of application issued by the Compensation Fund (COID) or a licensed compensation insurer (South African tenderers only).</p> <p>List of SHE Returnable.</p> <p>The tenderer must complete and return the following documents in accordance with the terms and conditions of the contract:</p> <p>Organisational Structure and Competencies of Key Appointees;</p> <ul style="list-style-type: none"> • Organisational Structure & Competencies of Key Appointees. Organogram illustrating the structure of the legal appointments (this has to be converted from generic to scope-of-work-specific on contract award); • Provide an OHS resource plan for the proposed scope of work. For each position, stipulate the position titles; roles; responsibilities, accountability, qualifications and competencies that will be required for each position; • Provide CV's of individuals that will fulfil the following roles, plus proof of registration with relevant approved professional body where applicable; • Provide a detailed plan how the Principal Contractor will fulfil the responsibility and accountability in terms of the Construction Regulations 2014, and of the relevant OHS statutory requirements: <ul style="list-style-type: none"> ✓ Construction Health and Safety Manager in terms of Construction Regulations 2014, CR 8 (5) and (6) and as per the SACPCMP requirements. 1 (One); ✓ Construction Health and Safety Officers in terms of Construction Regulations 2014, CR 8 (5) and (6) and as per the SACPCMP requirements.2 (two); 			✓

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

	<ul style="list-style-type: none"> ✓ Construction Manager in terms of Construction Regulations 2014, CR 8 (1) and as per the SACPCMP requirements; ✓ Construction Supervisor and Assistant Construction Supervisor in terms of Construction Regulations 2014, CR 8 (7) and (8); ✓ Details (competence) of the person/s conducting the hazard identification and risk assessment; • Details of the SHE- Training Matrix; • The signed copy of the acknowledgement form for Eskom Rules and Requirements; and • Detailed costing for SHE (not the consolidated amount) Costing to be done on the pricing schedule provided. This is a breakdown of all related SHE costing that will be incurred with the project i.e SHE training, SHE resources, SHE interventions, PPE, Ablution facilities, Medical examinations etc. <p>Occupational Health & Safety Plan and OHS Management System</p> <ul style="list-style-type: none"> • Provide in terms of CR 7 (1) (a) Construction Regulations 2014, an OHS plan for the proposed scope of work in response to this OHS Specification/Requirements. This Means a site, activity or project documented plan in accordance with the clients SHE requirements. The plan must be scope or project based. The plan must reflect an organised system (method statements, processes, resources etc) which the supplier/ Principal Contractor will comply to and enforce to manage the SHE risk during the lifecycle of the project; • Does your Company have a recognised OHS Management System? If yes, please provide a copy of the certification; • Provide a copy of a typical Health and Safety risk profile for a project of this nature as well as high level interventions that will be implemented to mitigate the risk; • Copy of the Company's SHE/Q Policy; • Baseline Risk Assessment- SHE hazards/aspect and risks/impact that are identified and assessed before 			
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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

	<p>the inception of a new project and commencement of operations. The baseline risk assessment shall include both routine and non-routine tasks;</p> <ul style="list-style-type: none"> • Incident management process: details of the notifications of occurrence within the period stipulated by the client and investigation within 7 (Seven) days and close-out of preventive action–taking into account Eskom’s time-frame requirements (refer to Eskom Incident Management Procedure 32-95); and • How is corrective and preventive action management addressed, from incidents and lessons learnt? <p>SHE communication and interface</p> <ul style="list-style-type: none"> • How will the Company communicate with and interface between the client, subcontractors and all responsible stakeholders during the execution of the contract? • The applicable contract/scope-of-work-specific SHE requirements that will be implemented and managed by the principal contractor. <p>Occupational Health and Wellness</p> <ul style="list-style-type: none"> • Valid Letter of Good Standing –registration with the Compensation Commissioner (COID) or a licensed mutual company or an equivalent thereof (for international bidders; • Process for the completion of the man-job specifications (risk-based) for each employee (including temporary / casual and labour broker persons) that is specific the: individuals, positions that they occupy, work environment and tasks that they perform. (This has to be converted from generic to scope-of-work-specific on contract award); • Pre-medical, periodic medical and exit medical examinations (medical surveillance) conducted in relation to the individual's man-job specifications and the health risk assessment for each employee (including temporary / casual and labour broker persons); and 			
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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

	<ul style="list-style-type: none"> Is there a process for ensuring that health risk assessments are performed. 			
Quality	<p>Documents that may be required per scope of work Quality Criteria</p> <p>Category 2 Requirements will apply as follows:</p> <p>SECTION A: Quality Management System Requirements ISO 9001</p> <p>(Option 1) Valid certification of Quality Management System (QMS) by an ISO accredited body:</p> <ul style="list-style-type: none"> A.1 Product / Service Scoping on ISO 9001 certificate is defined and relevant; A.2 Certificate by Approved and Authorized certification authority; A.3 Certification Authority has Recognized International Accreditation; and A.4 Validity (expiry date) of certificate. <p>(Option 2) Objective evidence of documented QMS that is not certified but complies with ISO 9001:</p> <ul style="list-style-type: none"> A.1 QMS Manual or a document that defines and describes the QMS and its scope or Quality Method statement based on scope; A.2 Quality Policy Approved by top management; A.3 Quality Objectives Approved by top management; A.4 Records required by ISO 9001 standard (List of Records); A.5 Control of documented information; A.6 Documented information for Control of nonconforming outputs; A.7 Documented information for Nonconformity and Corrective action; and A.8 Documented information for Internal audit. <p>SECTION B: Evidence of QMS in operation (Tender Quality Requirements -Ref 240-105658000)</p> <ul style="list-style-type: none"> B.1 Documented information for defined roles, responsibilities and authorities; B.2 Documented information for Control of Externally Provided Processes, Products and Services; and 			✓

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

	<ul style="list-style-type: none"> B.3 Latest copy of an internal management system audit report (with Nonconformity, Correction and/ or Corrective Action Reports). <p>SECTION C: Contract Quality Plan Requirements (Ref 240-105658000 and 240-109253698).</p> <ul style="list-style-type: none"> C.1 Draft Contract Quality Plan specific to the scope of work as described in the tender documents (Ref ISO 10005). <p>SECTION D: Quality Control Plan Requirements (Ref 240-105658000 or 240-109253302)</p> <p>QCP /Checklist/ ITP (Quality Control Plans) as per Scope of Works (Ref ISO 10005 & 240-105658000):</p> <ul style="list-style-type: none"> D.1 Example of an Inspection and Test Plan (ITP) or Quality Control Plan (QCP) on similar and/ or previous work done. <p>SECTION E: User defined additional Requirements & miscellaneous (Ref 240-105658000)</p> <p>Customer specific requirements & other standards and required can be listed and evaluated here:</p> <ul style="list-style-type: none"> E.1 Form A is completed and signed; and E.2 Welding specification. 			
Other safety/quality documents as required per scope of works				✓
Environmental	<p>Documents that may be required as per scope of work</p> <ul style="list-style-type: none"> How does the entity address environmental management. 			✓
Due Diligence	<p>Audited Financial Statements of the <i>tenderer</i> for the previous 18 months, or to the extent that such statements are not available, for the last year. Tenderers must note that in the case of a joint venture or special purpose vehicle (SPV) especially formed for this tender, audited financial statements for each participant in the JV / SPV is required. Start-up enterprises formed within the last 12 months are not required to send in statements, but if successful with their tender will be required to send statements for the first year when once available.</p>			✓

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

DOCUMENTS REQUIRED UNDER FUNCTIONALITY/TECHINICAL CRITERIA

Technical (required for functionality scoring)		✓		
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MANDATORY TECHNICAL EVALUATION CRITERIA

No'	Mandatory Technical Criteria Description (Yes/No)	Reference to Technical Specification / Tender Returnable	Motivation for use of Criteria
4.	Has the Tenderer confirmed that all major equipment and devices offered are of proven technology; supplied by the Original Equipment Manufacturers (OEMs) and have a minimum duration of five years since installation?	Tender Returnable: <ul style="list-style-type: none"> Submit OEM letter stating agreement letter between supplier and OEM on the supply of HVAC (Chillers and Cooling Towers). 	To ensure the equipment (Chillers and Cooling Towers) have a back-up from OEMs.
5.	Has the Tenderer confirmed that they have a track record of five completed projects as a minimum: for construction, commissioning and testing of HVAC systems? <ul style="list-style-type: none"> Submit a written confirmation stating that the supplier as completed at least 5 projects in HVAC systems. 	Tender Returnable: <ul style="list-style-type: none"> Written confirmation letter stating at least 5 projects completed by the supplier in HVAC systems with Project Values complete with traceable references. Award letters or completion certificates to be provided. 	Previous similar work experience and key personnel allocated to this project should be documented. This is to ensure that the Tenderer has the capability to undertake the Works.
6.	Professional Engineers who will sign off the design and installation once commissioned and completed. <ul style="list-style-type: none"> Submit written commitments or declaration confirming that all design work shall be signed off by Pr. Eng. (Mechanical, Electrical, C&I, and Civil). 	Tender Returnable: <ul style="list-style-type: none"> ECSA registered engineers' certificates to be attached. 	Mechanical heating ventilation and air conditioning systems are to be designed and signed off by a professional ECSA registered Engineer/Technologist.

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

QUALITATIVE TECHNICAL EVALUATION CRITERIA

	Qualitative Technical Criteria Description	Reference to Technical Specification / Tender Returnable	Criteria Weighting (%)	Sub-Criteria Weight (%)
1.	HVAC General Works		30	
1.1	Site Manager qualification and experience on similar projects (3.4.1). <ul style="list-style-type: none"> Similar Projects means HVAC systems consisting of Chillers, Cooling Towers, Pumps, AHUs, Piping, Ducts, etc. 	Tender Returnable <ul style="list-style-type: none"> Qualification and CV with traceable references. 		30
1.2	General HVAC Foreman qualification and experience on similar projects (3.4.2). <ul style="list-style-type: none"> Similar Projects means HVAC systems consisting of Chillers, Cooling Towers, Pumps, AHUs, Piping, Ducts, etc. 	Tender Returnable: <ul style="list-style-type: none"> Qualification and CV with traceable references. 		30
1.3	Lead time to mobilise team to site after contract award (3.4.3).	Tender Returnable: <ul style="list-style-type: none"> Written Declaration on lead time to mobilise team to site. 		10
1.4	The Tenderer is to provide a completed technical schedule of the HVAC equipment as listed under the technical data sheets section of the Technical Specification. The technical data sheets are to be supplemented by additional descriptions, explanations, drawings and all other information necessary for a clear understanding of equipment application (3.4.4).	Tender Returnable: <ul style="list-style-type: none"> Completed Technical Schedules. 		20

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

	1.5	The Tenderer is to provide a completed minimum equipment warranty schedule and confirm spares availability of the equipment as listed under the technical data sheets section of the Works Information. The minimum accepted equipment warranties, and spare support is 10 years for existing or refurbished equipment. (3.4.5)	Tender Returnable <ul style="list-style-type: none"> ○ OEM declaration letter stipulating minimum equipment warranty schedule and spares support availability for all the equipment as stipulated in the technical data sheets. 		10	
2.	Technical Qualifications and Deviations (3.4.6)			10		
	2.1	Has the Tenderer confirmed compliance to the full scope of work and Technical Specification for the Works Information? <ul style="list-style-type: none"> a) Compliance to scope of work. b) Declaration to undertake full scope of work. c) Compliance to standards and specifications. 			100	
3.	General (3.4.7)			20		
	3.1	Proposed work plan indicating <ul style="list-style-type: none"> • Commitment and declaration to undertake full scope of work whilst Matla Power Station remains live. Activities divided up realistically in schedule. Note: <ul style="list-style-type: none"> • The statement “whilst Matla Power Station remains live” implies that the Works must be executed while the station is operational i.e., Switchgears Rooms, Equipment Rooms, etc will be energised during the execution of the Works. The successful Tenderer will be required to provide a detailed 	Tender Returnable <ul style="list-style-type: none"> a) Commitment and Declaration letter to undertake full scope of work whilst Matla Power Station remains live. b) Preliminary Project Schedule showing key deliverable dates. Refer to section 3.4.7 for key items on Project Schedule. c) Project Specific Organogram showing key staff intended to be deployed in the project. This is to ensure that all roles and 		100	

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

		methodology or alternatives during construction. Thus, declaration is required at Tender Stage for this undertaking.	responsibilities are covered.		
4	Electrical Requirements			20	
	4.1.	LV Switchgear (Confirm compliance to standard) <ul style="list-style-type: none"> ○ SANS 1973-3: 2008 	Section 2.2.8.8 of the Works Information <ul style="list-style-type: none"> ○ Provide written declaration and/or commitment to compliance to applicable standard. 		50
	4.2.	Motor and Drives (Confirm compliance to standards) <ul style="list-style-type: none"> ○ 240-56360387, 240-56361435 and 240-57617975 	Section 2.2.8.9 of the Works Information <ul style="list-style-type: none"> ○ Provide written declaration and/or commitment to compliance to applicable standard. 		10
	4.3.	Cabling (Confirm compliance to standards) <ul style="list-style-type: none"> ○ 240-56227443 & SANS 10142 	Section 2.2.8.7 of the Works Information <ul style="list-style-type: none"> ○ Provide written declaration and/or commitment to compliance to applicable standard. 		20
	4.4.	Earthing and Lightning Protection (Confirm compliance to standards) <ul style="list-style-type: none"> ○ 240-56356396. 	Section 2.2.8.6 of the Works Information <ul style="list-style-type: none"> ○ Provide written declaration and/or commitment to compliance to applicable standard. 		10
	4.5	Small Power and Lighting (Confirm compliance to standard) <ul style="list-style-type: none"> ○ 240-55714363 	Section 2.2.8.10 of the Works Information <ul style="list-style-type: none"> ○ Provide written declaration and/or commitment to compliance to applicable standard. 		10

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

5.	C & I and BMS Requirements		Section 2.2.7.5 of the Works Information	20	
	5.1	C & I and BMS Requirements – Has the tender confirmed compliance to the Employer's requirements?	Section 2.2.7.5 of the Works Information <ul style="list-style-type: none"> Provide written declaration and/or commitment to compliance to Employer's Requirements. 		40
	5.2	Has the tenderer demonstrated that he has adequate relevant experience in the design of HVAC system?	Section 2.2.7.5 of the Works Information Submit a list of 5 completed HVAC Projects inclusive of C&I and BMS requirements namely: <ul style="list-style-type: none"> BMS Information, HMI and Software, Networking Equipment, Field Equipment or Instrumentation, Power Supplies, Cabling, Junction Boxes, Cabinets, Plant Coding, Testing and commissioning functions. Projects to have traceable references.		20

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

5.3	Has a tender provided a work method detailing how they plan to execute the work? What equipment and resources will be used and how they will be utilised by the contractor to complete the work?	Section 2.2.7.5 of the Works Information Submit detailed method statement covering the topics mentioned namely: <ul style="list-style-type: none"> o Work Execution Plan; o Equipment to be used; o Resources to be used and how they will be utilised; and o Method Statement to also cover the topics covered in section 2.2.7.5 of the Works Information. 		20
5.4	How does the contractor facilitate engineering changes?	Section 2.2.12.3 of the Works Information <ul style="list-style-type: none"> o Submit declaration and commitments to compliance to Project Engineering Change Management Procedure (240-53114026) and Engineering Change Management Procedure (240-53114002). 		20

The weight for the technical review will be 100 % with a minimum threshold of 70% and will be based on the following:

3.4.1 Site Manager


The Site Manager is the person to whom the Contractor has assigned the responsibility of decision making on all matters relating to the on-site activities (including programming). He/she shall commit to the project for its full duration, unless otherwise agreed by the parties. Should a substitution be allowed, only a person with the same or higher qualifications and experience will be accepted. The Contractor is to provide contactable references. Tenderers will score points for a nominated Site Manager in possession of a Mechanical or Electrical engineering qualification along with five (5) or more years working experience in the construction of large HVAC projects (Over 2 000 kW). Points will be awarded as follows:

Site Manager to have a qualification in HVAC/Mechanical or Electrical degree or Diploma or equivalent international acknowledgement to be considered compliant to be evaluated further.

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

SITE MANAGER (CRITERIA WEIGHTING – 30%)	Points	Score (%)
Working years within HVAC/Mechanical post graduations		
0 years	0	60
1-3 years	2	
4-5 years and above	4	
More than 5 years	5	
Experience on Chilled Water Systems and Commissioning of HVAC systems		
Number of projects < 0	0	40
Number of projects 1 < 3	2	
Number of projects 4 > 5	4	
Number of projects > 5	5	
Total Score		100

3.4.2 General Foreman

The General Foreman is the person to whom the Contractor has assigned the responsibility of supervising the teams engaged in construction activities. He shall commit to the project for its full duration, unless otherwise agreed by the parties. Should a substitution be allowed, only a person with the same or higher qualifications and experience will be accepted. The contractor is to provide contactable references.


Tenderers will score points for a nominated General Foreman with five (5) or more years working experience in the construction of large HVAC projects (Over 2 000 kW). Points will be awarded as follows:
Foreman to have Metric Qualification as a minimum and a Trade Test on Air Conditioning & Refrigeration, or equivalent international acknowledgement to be considered compliant to be evaluated further.

GENERAL HVAC FOREMAN (CRITERIA WEIGHTING – 30%)	Points	Score
Working years within HVAC/Mechanical post trade test qualification		
0 years	0	60
1-3 years	2	
4-5 years	4	
More than 5 years	5	
Experience on Chilled Water Systems and Commissioning of HVAC systems		
Number of projects < 0	0	40
Number of projects 1 < 3	2	
Number of projects 4 > 5	4	
Number of projects > 5	5	
Total Score		100

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

3.4.3 Lead time to mobilise team to site after contract award

LEAD TIME TO MOBILISE TEAM (CRITERIA WEIGHTING – 10 %)	Points	Score
More than 3 months	0	100
Between 2 and 3 months	2	
Between 1 and 2 months	4	
1 month or less	5	
Total Score		100

3.4.4 Completed technical schedule of the HVAC equipment

The Tenderer is to provide a completed technical schedule of the HVAC equipment as listed under the technical data sheets section of the Technical Specification (373-MAT—AABB-D00139-67). The technical data sheets are to be supplemented by additional descriptions, explanations, drawings, and all other information necessary for a clear understanding of equipment application. The assessment criterion is as follows:

TECHNICAL SCHEDULE OF HVAC EQUIPMENT (CRITERIA WEIGHTING – 20%)	Points	Score
No completed technical schedules	0	100
Technical schedules completed in full, but not supplemented by additional descriptions, explanations, and drawings	2	
Technical schedules completed in full, however only partial supplemented by additional descriptions, explanations, and drawings	4	
Technical schedules completed in full and completely supplemented by additional descriptions, explanations, drawings	5	
Total Score		100


3.4.5 HVAC Equipment Warranties

The Tenderer is to provide a completed minimum equipment warranty schedule and confirm spares availability of the equipment as listed under the technical data sheets section of the Works Information. The minimum accepted equipment warranties, and spare support is 10 years for existing or refurbished equipment. (3.4.5). The assessment criterion is as follows:

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

HVAC EQUIPMENT GUARANTEE AND SPARES AVAILABILITY (CRITERIA WEIGHTING – 10%)	Points	Score
No minimum equipment warranty schedule provided	0	100
Deviation to minimum equipment warranty schedule, not technically accepted (Less than 5 years)	2	
Deviation to minimum equipment warranty schedule, technically accepted (Between 5 years and 9 years)	4	
Minimum equipment warranty schedule completed in full and no deviation (Over 10 years)	5	
Total Score		100

3.4.6 Technical Qualifications and Deviations

Has the Tenderer confirmed compliance to the full scope of work and Technical Specification for the Works Information, section 1.6, 2.1 and 2.2 The assessment criterion is as follows:

DEFINITIONS
No completed technical qualifications and deviations <ul style="list-style-type: none"> Non-responsive or totally deficient.
Deviation, not technically accepted (non-compliance with the scope and specifications) <ul style="list-style-type: none"> Does not meet the technical requirement(s) AND/OR Unacceptable technical risk(s) AND/OR. Unacceptable exceptions AND/OR. Unacceptable conditions.
Deviation, technically accepted (compliance with scope and specifications) <ul style="list-style-type: none"> Meet the technical requirement(s) with, Acceptable technical risks AND/OR. Acceptable exceptions AND/OR. Acceptable conditions.
No deviations <ul style="list-style-type: none"> Meet the technical requirement(s) AND, No foreseen technical risk(s) in meeting technical requirements.

QUALIFICATIONS AND DEVIATIONS (CRITERIA WEIGHTING – 10 %)	Points	Score
No completed technical qualifications and deviations	0	100
Three or more deviations, not technically accepted.	2	
One to two deviations, not technically accepted.	4	
No deviations and/or technically accepted deviations	5	
Total Score		100

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

3.4.7 General

The assessment criterion proposed work plan is as follows:

PROPOSED WORK PLAN (CRITERIA WEIGHTING – 20%)	Points	Score
None of conditions of proposed work plan have been met	0	100
Only one condition of proposed work plan has been met	2	
Only two conditions of proposed work plan have been met	4	
All three conditions of proposed work plan have been met	5	
Total Score		100

Minimum Conditions

- Commitment and Declaration letter to undertake full scope of work whilst Matla Power Station remains live.
- Preliminary Project schedule showing key deliverable dates, activities divided up realistically in schedule, timelines realistic for execution of activity.

Minimum Key Activities:

- Approval of Engineering Drawings;
- Approval of Equipment Submittals;
- Procurement of Equipment;
- Contractor Site Access;
- Provision of Civil interfaces (wall penetrations, plinths, etc);
- Cooling/Condenser Water System, complete with cooling towers, pumps and piping inclusive of pressure test, etc;
- Chilled Water System, complete with chillers, pumps and piping inclusive of pressure test, etc;
- Installation of ducting complete with insulations, grilles and diffusers;
- Installation of AHUs/Packaged Units and Fans;
- Installation of piping complete with insulation and cladding;
- Installation of 400 V Panel complete with cabling and termination to equipment;
- Installation of BMS panel complete with cabling, field instruments and link with Overall HVAC BMS in the station;
- Quality Assurance, Quality Control and Inspection and Test Plans;
- Safety Clearance;
- Test and Commissioning;
- Data Packs compilation and approval;
- Site Acceptance; and
- SAQCC SANS 10147.

- Project Specific Organogram showing key staff intended to be deployed in the project.

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

4. ELECTRICAL REQUIREMENTS

The Tenderer is to provide a written declaration and commitment to compliance to mentioned standards. The assessment criterion is as follows:

ELECTRICAL REQUIREMENTS	Points	Score
No written declaration and commitment provided	0	100
Written declaration and commitment to full compliance to standard provided	5	
Total Score		100

5. C & I AND BMS REQUIREMENTS

The Tenderer is to provide a written declaration and commitment to compliance to mentioned standards. The assessment criterion is as follows:

5.1 COMPLIANCE TO C & I AND BMS REQUIREMENTS

Has the tender confirmed compliance to the employer's requirements? The assessment criterion is as follows:

COMPLIANCE TO C & I AND BMS REQUIREMENTS (CRITERIA WEIGHTING – 40 %)	Points	Score
No written declaration and commitment provided	0	100
Written declaration and commitment to full compliance to standard provided	5	
Total Score		100

5.2 EXPERIENCE IN HVAC C&I AND BMS SYSTEMS


Has the tenderer demonstrated that he has adequate relevant experience in the design of HVAC system inclusive of C&I and BMS Requirements? The assessment criterion is as follows:

EXPERIENCE IN HVAC C&I AND BMS SYSTEMS (CRITERIA WEIGHTING – 20%)	Points	Score
Number of projects < 0	0	40
Number of projects 1 < 3	2	
Number of projects 4 > 5	4	
Number of projects > 5	5	
Total Score		100

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

5.3 METHOD STATEMENT HVAC C&I AND BMS SYSTEMS

Has a tender provided a work method detailing how they plan to execute the work? What equipment and resources will be used and how they will be utilised by the contractor to complete the work? The assessment criterion is as follows:

METHOD STATEMENT HVAC C&I AND BMS SYSTEMS (CRITERIA WEIGHTING – 20%)	Points	Score
No method statement submitted	0	40
Only one condition of method statement has been met	2	
Only two conditions of method statement have been met	4	
All four conditions of method statement have been met	5	
Total Score		100

5.4 ENGINEERING CHANGES

How does the contractor facilitate engineering changes? The assessment criterion is as follows:

ENGINEERING CHANGES (CRITERIA WEIGHTING – 20 %)	Points	Score
No written declaration and commitment compliance to standard has been provided	0	100
Written declaration and commitment to full compliance to standard provided	5	
Total Score		100

NB. The tenderer must meet a minimum threshold of 70% to be considered for further evaluations.

SUPPLIER DEVELOPMENT LOCALISATION AND INDUSTRIALISATION

Subcontracting and Local-to-site Procurement

Mandatory subcontracting as a **condition for contract award:**

Tenderers must subcontract a minimum of 10% of the contract value with the following designated groups or categories:

- an EME or QSE;
- an EME or QSE, which is at least 51% owned by black people;
- an EME or QSE, which is at least 51% owned by black people who are youth;
- an EME or QSE, which is at least 51% owned by black people who are women;
- an EME or QSE, which is at least 51% owned by black people with disabilities;
- an EME or QSE, which is 51% owned by black people living in rural or underdeveloped areas or townships;
- a cooperative, which is at least 51% owned by black people; and
- an EME or QSE, which is at least 51% owned by black people who are military veterans or more than one of the categories referred to in paragraphs listed above.

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

Skills Development Targets will be applied as a condition of contract.

Skills Type	Number of learners	Intake	Outcome
Mechanical or Electrical Artisans	6	N3 Mechanical or electrical for artisans	Trade test Certificate
Safety Officer in a Construction Environment	3	Qualified Safety officer	SACPCMP Registration
Total	9		

Note The above-mentioned Skills are a guideline. The actual skills/trade type may be negotiated. However, expenditure of 0.25% of the Acceptable Contract Amount in accordance with the CIDB CSDG is a Condition for Contract Award.

The Tenderers are free to propose any other relevant Skills Development that will be feasible and benefit the previously disadvantaged communities. This may even include Workplace Integrated Learning (WIL) from the TVET Colleges within the Kriel, Thubelihle Township, Matla and Govan Mbeki Local Municipality Areas.

B-BBEE Requirements - B-BBEE Certificate

The Contractor is expected to submit a B-BBEE Certificate or Sworn Affidavit before Contract Award if not submitted for Tender Evaluation.

Maintain and/or improve B-BBEE Status

Awarded Contract is expected to maintain or improve their B-BBEE Recognition Level for the duration of the contract.

Enterprise Development (ED)


The main Contractor will be required to propose development in the following areas:

Support Description	Tenderer proposal
<p>Winning bidder to identify and incubate a (Small Medium Enterprise) SME from the designated groups, in one or more of the areas to be sub-contracted.</p> <p>Assistance could be in the form of business support and equipment and/or finance. Beneficiary must be from the Kriel, Thubelihle township, Matla and Govan Mbeki Local Municipality areas.</p> <p>Winning bidder will also be expected to draft an ED proposal within eight weeks of tender award. ED agreement must be signed with the beneficiary and sent to Eskom for review and acceptance. Progress will be monitored throughout the duration of the contract.</p>	

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

Job Opportunities and Upskilling of Employees

Tenderer to indicate number of Jobs to be created and/or retained due to this contract.

Number of Jobs to be created	Number of Jobs to be retained

The Contractor should ensure that all its General Workers and Semi-Skilled Workers and at least 30% of the skilled workers are recruited from within Kriel, Thubelihle township, Matla and Govan Mbeki Local Municipality areas.

SDL& I Performance Guarantee

- The Contractor shall submit an SDL&I Performance Guarantee equivalent to 2.5% of the Contract Value and shall only be released to the Contractor upon fulfilment of all SDL&I Obligations.
- The reduction of the percentage and release of the Performance Guarantee in tranches, proportionate to SDL&I's obligations' fulfilment, may be negotiated as an incentive to commit to SDL&I Undertakings mentioned above or that may be suggested by the Contractor.

Reporting and Monitoring

- The suppliers shall on a quarterly basis submit a report to Eskom in accordance with Data Collection Template on their compliance with the SDL&I obligations described above.
- Eskom shall review the SDL&I reports submitted by the suppliers within 30 (thirty) days of receipt of the reports and notify the suppliers in writing if their SDL&I obligations have not been met.
- Upon notification by Eskom that the suppliers have not met their SDL&I obligations, the suppliers shall be required to implement corrective measures to meet those SDL&I obligations before the commencement of the following report, failing which Retention clauses shall be invoked.
- Every contract shall be accompanied by the SDL&I Implementation Schedule which must be completed by the suppliers and returned to SDL&I representative for acceptance 28 days after contract award. This will be used as a reference document for monitoring, measuring, and reporting on the supplier's progress in delivering on their stated SDL&I commitments.

Criminal Clearance/Checks for Contractors Accessing Power Stations (NKP)

All Contractors on site must supply a SAPS clearance certificate every 12 (Twelve) months to ensure continued access to site.

The State Security Agency (SSA) in the execution of the National Strategic Intelligence Act 39 of 1994 advised Eskom as a State-Owned Company (SOC), to comply with the requirements of Paragraph 5 of Chapter 5 of the Minimum Information Security Standard (MISS) and to implement a screening process which intends to identify individuals who might through their actions and / or behaviour, could pose a risk to the operations of Eskom Holdings SOC Ltd.

Any Contractor to be found with a criminal record (Excluding road traffic excursions) will be denied access going forward.

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ANNEXURE A

ACKNOWLEDGEMENT FORM

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

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

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

Or: Incorrect or incomplete for the following reasons: ☐

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 No: _____

Name of company/JV: _____

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

Country of registration: _____

Name of contact person: _____


Contact details of contact person:

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ANNEXURE B

TENDERER'S PARTICULARS

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

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

Please complete the following:

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

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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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

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

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

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

8.1 Confirm if you intend sub-contracting.

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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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:-

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

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

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

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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

1. Single tenderers

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

Signature: _____

Designation: _____

Date: _____

2. Joint Ventures

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

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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ANNEXURE C

INTEGRITY DECLARATION FORM

Note: This returnable is required to be fully completed, signed and submitted by tenderers at the stipulated deadlines.

DECLARATION OF INTEREST

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

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

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

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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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

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

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

2. DECLARATION OF FAIR TENDERING PRACTICES

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

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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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><i>[Note: Companies/persons who are listed on the Database were informed in writing of this restriction by the Authority/Accounting Officer of the institution that imposed the restriction after the audi alteram partem rule was applied].</i></p> <p>The Database of Restricted Suppliers can be accessed on the National Treasury's website (www.treasury.gov.za).</p>		
1.2	<p>Is the <i>tenderer/s (or any of its directors / members / shareholders)?</i> listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combatting of Corrupt Activities Act (No 12 of 2004)</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za).</p>		
1.3	Was the <i>tenderer/s (or any of its directors/members/shareholders)</i> convicted by a court of law (including a court outside South Africa) for fraud and/or corruption with respect to the procurement/tendering processes/procedures during the past five years?		
1.3.1	Provide details.		
1.4	Was the <i>tenderer/s(or any of its directors/members/shareholders)</i> prohibited from doing business with any International Financial Development/funding Agency or Lending Institution		
1.5	Is there any history/record of the <i>tenderer/s (or any of its directors/members/shareholders)</i> failing to meet their contractual obligation with any SOC?		

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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 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.

Signature:	
Designation and capacity in which signing	
Date:	

Joint Ventures

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

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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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

Signature:	
Designation and capacity in which signing	
Date:	

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ANNEXURE D

CPA REQUIREMENTS FOR LOCAL GOODS AND SERVICES (SOUTH AFRICA)

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

This Section will not be applicable to professional services contract.

1. APPLICATION OF CPA

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

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

2. TENDER SUBMISSIONS

Tenderers shall comply with the following requirements:

a. Main offer:

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

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

b. Additional/Alternative offer:

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


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

Additional/Alternative Offers must be clearly indicated as such

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

3. ESKOM'S PREFERRED INDEX LIST

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

4. FOREIGN PORTION OF THE TENDER/AGREEMENT PRICE

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

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

3. NUMBER OF FORMULAE & INDICES

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

4. CPA FIXED PORTION

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


5. BASE DATE

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

The Cash Settlement or Cash Sellers Price

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

3. CPA FOR PROFESSIONAL SERVICES

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

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

No fixed portion is mandatory.

Signed	Date
Name	Position
Tenderer	


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

Labour	Commodities	Processed material	Transport	Others	
Labour general (hourly paid) SEIFSA, C3, actual labour cost	Steel StatsSA, P0142.1 Table 2, basic iron and steel	Mechanical engineering material SEIFSA, G, mechanical engineering material	SEIFSA, L2, road freight costs	StasSA, PO141 CPI (Headline) all items OR SEIFSA, D-2 (CPI)	
	Copper SEIFSA, F, copper metric ton	Electrical engineering material SEIFSA, G-1, electrical engineering material			
Labour general SEIFSA, C3 (a), actual labour cost (field force) where subsistence	Aluminium SEIFSA, R, aluminium	Building and construction material		StasSA, PO142.1), PPI 4. Final Manufacture d Goods	
	Zinc SEIFSA, F, zinc				

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

allowance is paid	Lead SEIFSA ,F, lead	SEIFSA, G, building and construction material		Or 5. Intermediate Manufacture d Goods OR 6. SEIFSA Table U Producer Price Index (PPI - final manufactured GOODS OR Intermediate Manufactured Goods
-------------------	--------------------------------	---	--	--

Table 2: Preferred Foreign Index List

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

Closing date of tender _____/_____/_____

TENDERER'S SIGNATURE _____

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ANNEXURE E

CPA (IG) REQUIREMENTS FOR FOREIGN GOODS AND SERVICES

CONTRACT PRICE ADJUSTMENT AND FOREX PAYMENTS – IMPORTATION

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

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

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

PART 1: PAYMENT OF FOREIGN COMMITMENTS

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

Payment Method 1A:

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

Please note that the contracting party must be the direct importer of the goods
Applicable (Y / N)

Payment Method 1B;

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

Please note:

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

Applicable(Y/N) or


Payment Method 2:

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

the supplier.

Please note:

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

Applicable (Y/N).....

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

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

Fixed ZAR pricing

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

Applicable (Y/N).....

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

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

PART 2: EXCHANGE RATES

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

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

PART 3: ADJUSTMENT OF IMPORTATION COSTS, ETC

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

	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.

1. MANUFACTURING CPA METHOD (LABOUR AND MATERIAL)

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


2. EXPATRIATE LABOUR METHOD

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ANNEXURE F1

SBD 6.2

DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS

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

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

1. General Conditions

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

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

Where

x is the imported content in Rand

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


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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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

2. **The stipulated minimum threshold(s) for local production and content (refer to Annex A of SATS 1286:2011) for this bid is/are as follows:**

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

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

(Tick applicable box)

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

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

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

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

Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	


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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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

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

IN RESPECT OF BID NO.

ISSUED BY: (Procurement Authority / Name of Institution):

.....
NB

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


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

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

Bid price, excluding VAT (y)	R
Imported content (x), as calculated in terms of SATS 1286:2011	R
Stipulated minimum threshold for local content (paragraph 3 above)	
Local content %, as calculated in terms of SATS 1286:2011	

If the bid is for more than one product, the local content percentages for each product contained in Declaration C shall be used instead of the table above.
The local content percentages for each product has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E.

(d) I accept that the Procurement Authority / Institution has the right to request that the local content be verified in terms of the requirements of SATS 1286:2011.

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

SIGNATURE: _____ **DATE:** _____

WITNESS No. 1 _____ **DATE:** _____

WITNESS No. 2 _____ **DATE:** _____

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



Adobe Acrobat Document

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



Adobe Acrobat Document

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




Adobe Acrobat Document

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ANNEXURE G

SBD 1

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)

BID NUMBER:		CLOSING DATE:		CLOSING TIME:	
DESCRIPTION					

THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN
THE BID BOX SITUATED AT (STREET ADDRESS)

SUPPLIER INFORMATION


NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes <input type="checkbox"/> No	
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)			
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)			
	<input type="checkbox"/>	A REGISTERED AUDITOR			
	<input type="checkbox"/>	NAME:			

[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs& QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

PART B
TERMS AND CONDITIONS FOR BIDDING

BID SUBMISSION:	
1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR ONLINE
3.	BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
4.	WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
5.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
TAX COMPLIANCE REQUIREMENTS	
1.	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
3.	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILE. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
4.	BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
5.	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
6.	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS	
1.	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO
2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
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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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

ANNEXURE H

SBD 6.1

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

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

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

1. GENERAL CONDITIONS

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

1. To be completed by the organ of state

The applicable preference point system for this tender is the 90/10 preference point system.

2. Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:
 1. Price; and
 2. Specific Goals.

1. To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	90
SPECIFIC GOALS	10
Total points for Price and SPECIFIC GOALS	100

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

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

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

3. DEFINITIONS

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

6. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

1. POINTS AWARDED FOR PRICE

3.1.1 THE 90/10 PREFERENCE POINT SYSTEMS

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

90/10

$$Ps = 90 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender


7. POINTS AWARDED FOR SPECIFIC GOALS

1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
1. an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
2. any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)
	1	10
	2	9
	3	6
	4	5
	5	4
	6	3
	7	2
	8	1
	Non-compliant contributor	0

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

DECLARATION WITH REGARD TO COMPANY/FIRM

1. Name of company/firm.....
2. Company registration number:
3. TYPE OF COMPANY/ FIRM
 - ☐ Partnership/Joint Venture / Consortium
 - ☐ One-person business/sole propriety
 - ☐ Close corporation
 - ☐ Public Company
 - ☐ Personal Liability Company
 - ☐ (Pty) Limited
 - ☐ Non-Profit Company
 - ☐ State Owned Company

[TICK APPLICABLE BOX]
4. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:
 1. The information furnished is true and correct;
 2. The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
 3. In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
 4. If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 1. disqualify the person from the tendering process;
 2. recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 3. cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 4. recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

5. forward the matter for criminal prosecution, if deemed necessary.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

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	Invitation to Tender	Document Identifier	240-114238630	Rev	16
		Effective Date	February 2023		
		Review Date	February 2028		

Annexure I

SBD 4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,

employed by the state?

YES/NO

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

Full Name	Identity Number	Name of State Institution

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

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

2.2.1 If so, furnish particulars:

.....
.....

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

1. If so, furnish particulars:

.....
.....

3. DECLARATION

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

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

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

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

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

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

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

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

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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.

1. 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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