

	Invitation to Tender	Document Identifier	240-114238630	Rev	28
		Effective Date	07 April 2026		
		Review Date	April 2031		

ESKOM HOLDINGS SOC LTD

INVITATION TO TENDER (ITT)

FOR

PROVISION OF PLANT INSTRUMENTATION DESIGN AND COMMISSIONING SERVICES INCLUDING ASSOCIATED ELECTRICAL AND CIVIL DESIGNS AND COMMISSIONING SERVICES FOR ALL SIX (06) UNITS AT LETHABO POWER STATION.

Tender number	E3342GCDLET.
Issue date	11 August 2026.
Closing date and time	02 September 2026 at 10h00.
Tender validity period	120 days from the closing date and time.

Non-Compulsory Clarification meeting

A non-compulsory clarification meeting will be held online via MS Teams.

Date: 20 August 2026.

Time: 10h00.

Below is the info to join the non-compulsory meeting on MS Teams:

Link: <https://teams.microsoft.com/meet/351816406023990?p=i2tEDXiE1MVsf8Zsw6>

Meeting ID: 351 816 406 023 990

Passcode: 2Dm6Wh6H

Dial in by phone

+27 21 834 0825,947473639# South Africa, Cape Town

Find a local number

Phone conference ID: 947 473 639#

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Non-Compulsory Site Walk Meeting	A non-compulsory site walk will be held as follows: Date: 21 August 2026 Time: 10h00 Venue: Lethabo Power Station GCD Offices next to visitor's centre Vaaldam Road Deneysville Vereeniging Viljoensdrift 1930. Tenderers are required to confirm their intention to attend the site visit with the Eskom Representative, stating the name, position and contact details of each proposed attendee. The following is the required PPE for plant walk: 1. Hard hat with chin strap. 2. Safety glasses. 3. Ear plugs. 4. Dust masks. 5. Gloves. 6. Safety boots. 7. Long overalls (pants and jackets). 8. Reflective jackets if overalls are not available. NB: No shorts, short sleeve shirts and t-shirts are allowed in the plant. Tenderers are required to be on site at 9h00 for the induction before commencement of the site walk.
Tenders are to be delivered to the following address by the stipulated closing date and time	The tenderer must upload the tender via Eskom Tender bulletin site on the Eskom E- tendering page. The documents need to be uploaded under the folder Technical, Commercial, Financial, and other. All documents need to be submitted in a PDF format (The upload size per document is 500 megabytes and total submission is restricted to 4 gigabytes). The price list needs to be submitted in PDF and/ or a copy in excel format.

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	No Zip/condense files can be uploaded. No hard copy will be accepted If you resubmit your tender, only the latest version will be accepted, and all previous submissions will become null and void. Please ensure that the submission status is indicated as complete. Supplier Help Manual guide and video can be found on Eskom E-Tendering page.
Tenders are to be submitted electronically via Eskom E- tendering site by the stipulated closing date and time. Please note it is the responsibility of the supplier to ensure that the tender submission is submitted before the closing time.	Tenders are to be submitted electronically via Eskom E- tendering site by the stipulated closing date and time.

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Invitation to Tender

Eskom Holdings SOC Ltd (hereinafter “Eskom”) invites you to submit a tender for the Provision of Plant Instrumentation Design and Commissioning services including associated Electrical and Civil Designs and Commissioning services for all six (6) units at Lethabo Power Station.

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

1. Free of charge

Eskom has delegated the management of this Invitation to Tender to the Eskom Representative whose name and contact details are set out in the Tender Data. The submission of a tender by you in response to this Invitation to Tender will be deemed as your acceptance of the Eskom Standard Conditions of Tender which may be accessed at www.eskom.co.za.

All queries and clarifications relating to the Invitation to Tender documents must be addressed in writing to the Eskom Representative. No query or clarification may be addressed to any Eskom official other than the Eskom Representative.

Yours faithfully



Procurement Manager

Pamela Cele

Date: 11/08/2026

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1.1 Annexures to the Tender

The following document listed hereunder are attached to this Invitation to Tender.

Number	Description	Annexure	Attached (Y / N / N/A)
1.1.1	*Authorisation Form	Annexure A	Y
1.1.2	*Acknowledgement form	Annexure B	Y
1.1.3	*Tenderer's particulars	Annexure C	Y
1.1.4	*Integrity Declaration Form (Suppliers are required to download and read the Supplier Integrity Pact. It is accessible on the Eskom Tender Bulletin via Eskom Supplier Integrity Pact (eskom.co.za) link)	Annexure D	Y
1.1.5	*CPA Requirements for Local Goods/Services	Annexure E	Y
1.1.6	*CPA(IG) for Foreign Goods/Services (if applicable)	Annexure F	Y
1.1.7	SBD 6.2 Declaration Certificate for Local Production and Local Content (only applicable if designated materials are included and then Tenderers will be required to complete and submit Annexures G1 to G4 as evidence of compliance with this requirement).	Annexure G1	N/A
	Annexure C Local Content Declaration- Summary Schedule	Annexure G2	N/A
	Annexure D Imported Content Declaration – Supporting Schedule to Annexure C	Annexure G3	N/A
	Annexure E Local Content Declaration- Supporting Schedule to Annexure C	Annexure G4	N/A
1.1.8	*SBD 1 Invitation to Bid must be filled out by all tenderers and submitted with the tender at tender submission deadline	Annexure H	Y
1.1.9	*SBD 6.1 Preference Points Claim Form in terms of PPPFA 2022 regulations	Annexure I	Y
1.1.10	*SBD 4 – Bidders Disclosure	Annexure J	Y
1.1.11	Tax Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust, is a personal service provider for purposes of PAYE	Attached with the tender documents	Y

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Number	Description	Annexure	Attached (Y / N / N/A)
1.1.12	Reverse e-auction training acknowledgement form (if applicable)	N/A	N/A
1.1.13	Reverse e-auction process (if applicable)	N/A	N/A
1.1.14	E-tendering Help Manual acknowledgement form	Attached with the tender documents	Y
1.1.15	E-tendering Help Manual for supplier	Attached with the tender documents	Y
1.1.16	CIDB Contract Skills Development Goals (CSDG) (if applicable)	N/A	N/A
1.1.17	Contract Participation Goals (CPG) (if applicable).	N/A	N/A
1.1.18	Scope of Work	Attached with the tender documents	Y
1.1.19	NEC 3 Professional Service Contract (PSC).	Attached with the tender documents	Y
1.1.20	Pricing Schedule/BOQ (if not contained in Contract) PDF and/ or copy in excel format. The upload size per document is 500 megabytes and total submission is restricted to 4 gigabytes.	Attached with the tender documents	Y

1.2 Tender Data

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 are not attached to the Invitation to Tender, then 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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Clause Number from Standard Conditions of Tender	Tender Data
1.1 Parties	The Employer is Eskom Holdings SOC Ltd Name: Romeo Mokwena and Lerato Monareng Tel: +27 13 699 7369 E-mail: MokwenRJ@eskom.co.za E-mail: MonareLS@eskom.co.za
1.3 Tender documents	The Invitation to tender number is: E3342GCDLET See the content list above for the tender documents.
1.4 Type of Invitation to Tender	This Invitation to Tender is: An open Invitation to Tender
1.6 Eskom's right to accept or reject any tender	The tender shall be for the whole of the contract.
2.1 Eligibility	Tenderers (whether a single company or an incorporated or unincorporated joint venture or consortium) must meet the eligibility criteria stated in the Tender Data. The tenderer, or any of its principals, must not be under any restriction to do business with Eskom or State-Owned Companies. <u>Tenderers are ineligible to submit a tender if:</u> - Tenderers have the nationality of a country on any international sanctions list. A tenderer shall be found to have the nationality of a country if the tenderer is a national or is constituted, incorporated, or registered and operates in conformity with the provisions of the laws of that country. This criterion shall also apply to the determination of the nationality of proposed subcontractors or suppliers for any part of the Contract including related services. - Tenderers submit more than one [tender/proposal] either individually or as a partner in a joint venture (JV) or consortium, except on an E-Tendering system where there is a limit size (The upload size per document is 500 megabytes and total submission is restricted to 4 gigabytes).

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Clause Number from Standard Conditions of Tender	Tender Data
	3. Tenders submitted by a joint venture 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. Prima facie evidence that a tenderer has a conflict of interest with one or more parties in this tendering process is: (a) they have a controlling partner or majority shareholder in common; or (b) they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender of another tenderer, or to influence the decisions of the Employer regarding this bidding process; 5. Tenders signed by non-authorised persons. 6. Any tenderer that is restricted by National Treasury. 7. Any tenderer on the Tender Defaulters list. 8. Any tenderer and/or its director/s that is restricted by Eskom. 9. A tenderer that sub-contracts 100% of the Scope of Work Eskom will disqualify tenderers that are found not to have met the eligibility criteria.
2.2 - 2.5 Tender Closing	The deadline for Tender submission is: Date 02 September 2026 Time 10h00 Late Tenders will not be accepted.
2.7-.2.11 Submitting a tender.	Tenders are to be submitted electronically via Eskom E- tendering site by the stipulated closing date and time. The tenderer must upload the tender via Eskom Tender bulletin site on the Eskom E- tendering page. The documents need to be uploaded under the folder Technical, Commercial, Financial, SDL&I, Planning and Scheduling, SHEQ and other. All documents need to be submitted in a PDF format (The upload size per document is 500 megabytes and total submission is restricted to 4 gigabytes).

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	The price list needs to be submitted in PDF and/ or a copy in excel format. No Zip/condense files can be uploaded No hard copy will be accepted If you resubmit your tender, only the latest version will be accepted, and all previous submissions will become null and void. Please ensure that the submission status is indicated as complete. Supplier Help Manual guide and video can be found on Eskom E-Tendering page
2.12 Tender Validity Period	The tender validity period is 120 days
2.15 Site visit and/or clarification meeting	Refer to pages 1 and 2 of this invitation to tender. Tenderers must confirm their intention to attend the site visit and the clarification meeting with the Eskom Representative, stating the name, position and contact details of each proposed attendee.
2.16 Seeking clarification	The tenderer may notify Eskom of any clarifications required before the closing time for clarification queries, which is [5] working days before the deadline for tender submission.
2.22 Alternative tenders	Alternative tenders are not allowed .
2.33 Cataloguing	Not Applicable.
2.34 Provision of Security for Performance	The following forms of security are required for this tender: 1. Performance Bond If the provision of security for performance in the form of a performance bond or a demand guarantee is a requirement, the tenderer must select a minimum of two (2) financial institutions that it is likely to approach from the list provided of Eskom-approved financial institutions. Below is the list of financial institutions that are pre-approved by Eskom's Treasury. 1. Absa Bank Limited 2. Development Bank of South Africa 3. FirstRand Bank Limited 4. Industrial Development Corporation of SA

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Clause Number from Standard Conditions of Tender	Tender Data
	5. Investec Bank Limited 6. Land and Agricultural Development Bank of South Africa 7. Nedbank Limited 8. Standard Bank of South Africa Ltd 1. Barclays Bank PLC 2. BNP Paribas 3. Citibank N.A. 4. Commerzbank AG 5. Credit Agricole Corporate and Investment Bank 6. Deutsche Bank AG 7. Standard Chartered Bank 8. Toronto-Dominion Bank 9. UBS AG 10. HSBC Bank PLC 11. JPMorgan Chase Bank 12. Rabobank Nederland 13. Royal Bank of Scotland N.V. 14. Societe Generale Other 15. American International Group Inc. 16. Asian Infrastructure Investment Bank (AIIB) 17. Bank of China Ltd 18. Bank of Taiwan 19. Bank of Tokyo-Mitsubishi UFJ Ltd 20. China Construction Bank 21. Danske Bank A/S 22. ING Bank NV 23. Macquarie Bank Ltd 24. Mizuho Bank Ltd 25. Mizuho Corporate Bank Ltd 26. SACE SpA 27. Siemens Financial Services GmbH 28. Sumitomo Mitsui Banking Corp. 29. Unicredit Bank Austria AG 30. Unicredit Corporate Banking SpA 31. Zurich Financial Services Group 32. Zurich Insurance PLC
3.4 Tender Opening	There will be no public opening of tenders. Tenders will be downloaded electronically.
3.5 Tender Prices	Prices will not be read out .

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3.6 Basic Compliance	Basic compliance with this Invitation to Tender requires a tenderer to meet all the following requirements: Basic compliance for this invitation to tender: 1. Electronic copy of the tender. Failure to provide electronic copy of the tender by the deadline for tender submission will immediately render their tender nonresponsive and will be disqualified from further evaluation. 2. Meet the eligibility criteria for a tenderer. Tenderers (whether a single company or an incorporated or unincorporated joint venture or consortium) must meet the eligibility criteria stated in the Tender Data. The tenderer, or any of its principals, must not be under any restriction to do business with Eskom or State-Owned Companies. 3. Fully completed pricing schedule. These returnable are required to be submitted with the tender at Tender closing date and time. If not submitted by tender closing date and time, the tender will be disqualified. Failure to have submitted/uploaded tender documents via Eskom E-tendering site will render the tender non-responsive.						
3.7 Mandatory tender returnables for evaluations.	A tenderer that does not submit mandatory documents by or the complete information required in mandatory documents by the deadlines as stipulated in the Tender Returnable section of the respective Invitation to Tender will be deemed non-responsive.						
3.8 Functionality requirements	Functionality requirements are applicable The following criteria will be applicable for this transaction under functionality criteria: <table border="1"> <tr> <th>Criteria</th><th>Weight</th></tr> <tr> <td>Technical</td><td>100%</td></tr> <tr> <td>Threshold</td><td>80%</td></tr> </table> Tenderers who do not meet the threshold of 80% for functionality scoring will be disqualified	Criteria	Weight	Technical	100%	Threshold	80%
Criteria	Weight						
Technical	100%						
Threshold	80%						
3.9 Evaluation of Price	Prices will be evaluated as follows:						

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	1. Inclusive of VAT; 2. Corrected for arithmetical errors; 3. Excluding contingencies in any bill of quantities or activity schedule' 4. Adjusted for any other acceptable variations, deviations, or alternative tenders submitted; and 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. 6. Unconditional discounts will be taken into account for evaluation purposes. 7. Conditional discounts will not be taken into account for evaluation purposes but will be implemented when payment is effected. Prices will be scored out of 90 points.

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Clause Number from Standard Conditions of Tender	Tender Data																				
3.10 Evaluation of Specific Goals	Specific goals will be scored out of 10 points in accordance with the PPPFA. If a tenderer fails to submit evidence of its points claim for a Specific Goal, it will not be disqualified. However, it will be awarded 0 points for that Specific Goal. A maximum of 10 points may be awarded to a tenderer for the specific goal specified for the tender. The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places. Subject to section 2(1)(f) of the Preferential Procurement Policy Framework Act, the contract must be awarded to the tenderer coring the highest points. <table border="1"> <thead> <tr> <th>B-BBEE Status Level of Contributor</th><th>Number of points (90/10 system)</th></tr> </thead> <tbody> <tr><td>1</td><td>10</td></tr> <tr><td>2</td><td>9</td></tr> <tr><td>3</td><td>6</td></tr> <tr><td>4</td><td>5</td></tr> <tr><td>5</td><td>4</td></tr> <tr><td>6</td><td>3</td></tr> <tr><td>7</td><td>2</td></tr> <tr><td>8</td><td>1</td></tr> <tr><td>Non-compliant contributor</td><td>0</td></tr> </tbody> </table>	B-BBEE Status Level of Contributor	Number of points (90/10 system)	1	10	2	9	3	6	4	5	5	4	6	3	7	2	8	1	Non-compliant contributor	0
B-BBEE Status Level of Contributor	Number of points (90/10 system)																				
1	10																				
2	9																				
3	6																				
4	5																				
5	4																				
6	3																				
7	2																				
8	1																				
Non-compliant contributor	0																				

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	Tender Returnable if the above elements are requirements. - Valid original or certified copy of affidavit in the case of EME's must be submitted (sworn affidavit must be completed fully), or - Valid Copy B-BBEE Certificate issued by CIPC for EME's, or - Valid original or certified copy of the B-BBEE certificate / affidavit in the case of QSE's must be submitted, or - Valid original or certified copy of the B-BBEE certificate issued by SANAS Accredited Verification Agency for Generic Entities must be submitted, or - For JV's only valid original or certified copy B-BBEE Certificate issued by a SANAS Accredited Verification Agency will be accepted and the certificate should be in the name of the JV. A tenderer failing to provide documentation for the allocation of preference points will not be disqualified, but (a) may only score points out of 90 for price and (b) scores 0 points out of 10 for specific goals. Reconstruction and Development Programme (RDP) Goals <table><tr><td colspan="4">The Consultant is expected to assist Eskom with the development of skills and professional registration of Engineering Graduates Eskom's Targets:</td></tr><tr><td>Qualification</td><td>Number</td><td>Entry Level</td><td>Output</td></tr><tr><td>National Diploma (Electrical)</td><td>3</td><td>S4</td><td>National Diploma (Electrical) Graduate</td></tr><tr><td>Professional Engineer</td><td>1</td><td>B-Engineering Degree and Project experience</td><td>ECSA Registration</td></tr><tr><td>Professional Technologist or Technician</td><td>1</td><td>National Diploma/Degree in Engineering (any Discipline) and Construction experience</td><td>ECSA Registration</td></tr><tr><td>Draughtsman</td><td>1</td><td>South African Council for the Architectural Profession (SACAP)</td><td></td></tr><tr><td>Total</td><td>6</td><td></td><td></td></tr></table> The beneficiaries of Skills Development shall be South Africans and should be reflective of the population demographics.	The Consultant is expected to assist Eskom with the development of skills and professional registration of Engineering Graduates Eskom's Targets:				Qualification	Number	Entry Level	Output	National Diploma (Electrical)	3	S4	National Diploma (Electrical) Graduate	Professional Engineer	1	B-Engineering Degree and Project experience	ECSA Registration	Professional Technologist or Technician	1	National Diploma/Degree in Engineering (any Discipline) and Construction experience	ECSA Registration	Draughtsman	1	South African Council for the Architectural Profession (SACAP)		Total	6		
The Consultant is expected to assist Eskom with the development of skills and professional registration of Engineering Graduates Eskom's Targets:																													
Qualification	Number	Entry Level	Output																										
National Diploma (Electrical)	3	S4	National Diploma (Electrical) Graduate																										
Professional Engineer	1	B-Engineering Degree and Project experience	ECSA Registration																										
Professional Technologist or Technician	1	National Diploma/Degree in Engineering (any Discipline) and Construction experience	ECSA Registration																										
Draughtsman	1	South African Council for the Architectural Profession (SACAP)																											
Total	6																												

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3.11 Ranking of tenders	Tenderers will be ranked by applying the preferential point scoring for the 90/10 system. Eskom will add the score from Pricing and Specific Goals together and rank the suppliers from the highest to the lowest.
3.13 Objective Criteria (if applicable)	Objective criteria are not applicable.
3.14 Reverse e-auction (if applicable)	Reverse e-auction is not applicable

Contractual Requirements

Mandatory Commercial Contractual Requirements (Non disqualifiable)

Mandatory Commercial Contractual Requirements that **must** be included and submitted with the tender are as follows:

- Proof of valid and current CSD Registration (CSD number/CSD Report).
- Tax Clearance Certificates A certified copy of a tax clearance certificate is required from foreign tenderers (with a footprint in South Africa but that are not registered on CSD and have not provided a SARS pin number) and local tenderers (that 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 complete the SBD1 document; however, no proof of tax compliance is required.
- Tax Evaluation Questionnaire (Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE.
- Compliance with Employment Equity Act - To the extent that the tenderer falls within the definition of a "designated Employer" as contemplated in the Employment Equity Act 55 of 1998, the tenderer is required to furnish the Employer with proof of compliance with the Employment Equity Act, including proof of submission of the Employment Equity report to the Department of Labour. (South African tenderers only).

Additional Contractual Requirements:

Finance Contractual Requirements

Financial Viability Analysis (including submission of relevant financial statements)

- 24 months Audited Financial Statements.
- Financial Statement should not be more than 18 months (post year-end)

Latest, approved annual financial statements, including:

- Background to the company.

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Clause Number from Standard Conditions of Tender	Tender Data
- A signed director's report. - A signed auditor's/reviewer's/compiler's/accounting officer's report. - Statement of financial position. - Statement of comprehensive income. - Statement of changes in equity. - Statement of cash flows. - Notes to the financial statements.	
PIS SCORE	
A signed copy of the public interest score (only applicable to South African entities that are not audited).	
ITA34C	
- Income Tax assessment, only used if supplier is not audited - Giving the actual score	
JOINT VENTURES	
For unincorporated JV or a SPV, each partner in the JV or a SPV must submit its annual financial statements including all items listed above.	
Safety Contractual Requirements.	
- Signed Annexure B (Acknowledgement form for Eskom's rules) acknowledgement of Eskom's OHS legal and other requirements. - Health and Safety Plan, which must address the project /scope of work OHS risk(s) and be aligned with the health and safety specification or requirements.	
Covid-19 Plan	
- Detailed costing for Occupational Health and Safety (OHS). The cost should be broken down, not provided as a lump sum. The costing must be based on the overall scope of work/service to be performed, and the risk assessment may serve as a guideline. - Provision of Baseline Risk assessment (BRA). Identification, assessment, and management of OHS risks related to the scope of work. The methodology used for the risk assessment must be provided with the BRA and Covid-19 Baseline Risk Assessment - Valid letter of good standing (COIDA or equivalent). - Medical fitness certificate x 1 and annexure 3 or medical surveillance programme - OHS policy signed by CEO. The policy must comply with OHS Act Section 7. - OHS competency to consider scope of work, risks, SHE plan and applicability. CVs and qualifications / certificates to be provided, including proof registration with SACPCMP for CHSO and CHSM. List the competencies required.	

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Clause Number from Standard Conditions of Tender	Tender Data
Environmental Contractual Requirements.	
1.	Signed Annexure B (Acknowledgement form for Eskom's rules) acknowledgement of Eskom's OHS legal and other requirements.
2.	Environmental Management Plan for the Scope of work addressing the following as a minimum: - Waste management (reduction, re-use, recycling, disposal). - Environmental induction. - Environmental incident management. - Emergency planning for environmental incidents. - Environmental management structure within the Company: Professional Registration of environmental resources(s), responsibility and accountability. - Method statements related to activities that have significant environmental impacts (methodology and approach) illustrating how environmental impacts and risks are managed. - Approach to ensuring compliance with environmental compliance obligations. - Environmental competency, training, appointments. - Environmental communication and awareness
3.	Detailed costing for environmental management related to the overall scope of work/service to be performed and the aspect and impact may serve as a guideline. The cost must be broken down, not provided as a lump sum.
4.	Identification of Environmental Aspects and Impacts: Identification, assessment and control of activities that have or may have an impact on the environment. The methodology used must be provided together with the identified activities based on the scope of work that have an impact on the environment and the controls that will be in place in contract execution.
5.	Aspects and Impacts Register
6.	Objectives, targets, and program for meeting objectives
7.	Environmental (or SHE/SHEQ) policy signed by CEO. Policy to include commitment to environmental compliance obligations and environmental duty of care.
8.	Environmental competency to consider scope of work, risks, Environmental Management Plan and applicability, CVs, and qualifications / certificates e.g. - Environmental Officer (Registered with SACNASP). - Environmental Officer CV with minimum 3 years' experience in construction Environmental Management. - Submit the CV of designated person/s. Incident investigator(s).

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Clause Number from Standard Conditions of Tender	Tender Data
Quality contractual requirement	
QUALITY REQUIREMENTS	Deliverables to be submitted = 1
SECTION A Quality Management System Requirements ISO 9001:2015 (Ref 240-105658000 or 240-51544462)	
	Apply (Yes=1)
A.1 Product / Service Scoping on ISO certificate is defined and relevant	1
A.2 Certificate by Approved and Authorized certification authority	1
A.3 Certification Authority has Recognized International Accreditation	1
A.4 Validity (expiry date) of certificate	1
Sub-Section A Score Option 1	4
SECTION A Quality Management System Requirements ISO 9001 2015 (Ref 240-105658000 or 240-51544462)	OR
A.1 QMS Manual or a document that defines and describes the QMS and its scope or Quality Method statement.	0
A.2 Quality Policy Approved by top management.	0
A.3 Quality Objectives Approved by top management.	0
A.4 Control of documented information (i.e. document and record control) Clause 7.5 of ISO 9001:2015	0
A.5 Documented information for Control of nonconforming outputs Clause 8.7 of ISO 9001:2015	0
A.6 Documented information for Nonconformity and Corrective action Clause 10.2 of ISO 9001:2015	0
A.7 Documented information for Internal audit Clause 9.2 of ISO 9001:2015	0
Sub-Section A Score Option 2	0

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Clause Number from Standard Conditions of Tender	Tender Data	
SECTION B Evidence of QMS in operation (Tender Quality Requirements -Ref 240-105658000 or 240-51544462)		
	Apply (Yes=1)	
B.1 Documented information for defined roles, responsibilities and authorities - Organization chart and Responsibility matrix (must include but not limited to quality management function/ role) (Clause 5.3 of ISO 9001:2015)	1	
B.2 Documented information for Control of Externally Provided Processes, Products and Services - Must include criteria for evaluation, selection, monitoring of performance, and re-evaluation of external providers (Clause 8.4 of ISO 9001:2015)	1	
B.3 Latest copy of an internal management system audit report (with Nonconformity, Correction and/ or Corrective Action Reports) - Report must include but not limited to Objective, Scope, Criteria and outcomes of the audit. (Clause 9.2 of ISO 9001:2015)	1	
B.4 Latest copy of a certification management system audit report not older than 12 months (with Nonconformity, Correction and/ or Corrective Action Reports) B.4 Latest copy of a certification management system audit report not older than 12 months (with Nonconformity, Correction and/ or Corrective Action Reports)	1	
B.5 Records of Management Review meetings (minutes, attendance registers etc)	1	
Section B Score	5	
SECTION C Contract Quality Plan Requirements (Ref 240-105658000 and 240-109253698).		
Draft Contract Quality Plan specific to the scope of work as described in the tender documents (Ref ISO 10005)	Apply (Yes=1)	
NB! Draft Contract/Project Quality Plan has important QA deliverables	1	
Section C Score	1	

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Clause Number from Standard Conditions of Tender	Tender Data	
SECTION D Quality Control Plan Requirements (Ref 240-105658000 Annexure I or 240-51544462)		
QCP /Checklist/ ITP (Quality Control Plans) as per Scope of Works (Ref ISO 10005 & 240-105658000)	Apply (Yes=1)	
NB! Example of an Inspection and Test Plan (ITP) or Quality Control Plan (QCP) on similar and/ or previous work done	1	
Section D Score	1	
SECTION E User defined additional Requirements & miscellaneous (Ref 240-105658000) Customer specific requirements & other standards and required can be listed and evaluated here		
	Apply (Yes=1)	
E.1 Form A is completed and signed.	1	
E.2 Add other requirements (if applicable) as per the scope of work and/ or specification.	1	
Section E Score	2	

Supplier Development Localisation and Industrialisation Contractual Requirements

Maintain and/or improve B-BBEE Status:

- Awarded Contractor is expected to maintain or improve their B-BBEE Recognition Level for the duration of the contract, and the foreign company will be expected to comply with South African Law once it has been awarded the Contract.

Contribution towards Corporate Social Investment (CSI):

The CSI contribution will be ONE PERCENT (1%) of the Contract Value, and the Service Provider will be expected to either match or exceed this amount for its own CSI philanthropic contribution.

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Clause Number from Standard Conditions of Tender		Tender Data
Planning and Scheduling		
Sub Criteria Level	Qualitative Technical Criteria Description	
1	The Tenderer submit a DETAILED LEVEL 4 PROGRAMME in Primavera (XER) format, showing the following:	
	a) All project activities for work to be executed by the Consultant;	
	b) Activities for work to be executed by the Subconsultants	
	c) The entire scope of the works must be represented on the Programme.	
	d) Basis of Programme memorandum documents submitted with the programme	
2	The Programme shall be submitted as a Hardcopy (PDF) and Electronic Copy (XER).	
3	The Programme shows logical links/ sequence/ relationships that connect the various activities together including all quality intervention points.	
4	The Critical Path Method (CPM) technique is used for programming and planning for the entire scope of works	
5	The Programme shows that the works is completed within accepted durations which is consistence with Key and Sectional Completion Dates provided in the Contract Data by the Employer and basis of programme attached.	
Contractual Requirements are not evaluation criteria. They will be assessed after the evaluation and ranking of the tenders. Proof that the tenderer recommended for award has met the stipulated contractual requirements must be submitted prior to contract award.		
Failure to meet stipulated Contractual Requirements by the stipulated deadlines may result in the tenderer being regarded as non-responsive and ineligible for contract award.		
3.15 Sign form of Agreement/ Contractual Conditions	The conditions of the contract will be the NEC 3 Professional Service Contract (PSC).	
2.16 CIDB Requirements (where applicable for Engineering and Construction Works Contracts)	CIDB Requirements are not applicable.	
2.17 Contract Skills Development Goals (CSDG)	Not Applicable.	
2.18 Contract Participation Goals	Not Applicable.	

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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 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 its 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 authorized body or person; or
- (b) a sworn affidavit as prescribed by the B-BBEE Codes of Good Practice; or
- (c) any other requirement prescribed in terms of the Broad-Based Black Economic Empowerment Act

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1.2 TENDER RETURNABLES

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

NOTE THE FOLLOWING: -

* Returnables required at Tender closing (disqualifiable)

These returnables are required to be completed, signed (if required on the returnable) and submitted with the tender at Tender closing date and time. If not completed, signed (if required on the returnable) and/or submitted by tender closing, the tenderer will be disqualified.

** Returnable required at Tender closing (non-disqualifiable): -

These returnables are required to be completed, signed (if required on the returnable) and submitted with Tender at Tender closing date and time; however, if not submitted by Tender closing, or submitted with incomplete information or without a required signature, the Procurement Practitioner will, in writing, request the tenderer to submit the returnable within 5 working days. If the returnable is not completed, signed if required and/or received by the Procurement Practitioner within 5 working days of the request, the tenderer will be disqualified.

The 5 working days period does not apply to CIDB proof of grading. Refer to the returnable table the prescribed period for CIDB proof of grading.

Returnables required at Tender Closing date and time for evaluation: -

These returnables are required to be submitted at tender closing date and time. These returnables will not be requested by the Procurement Practitioner. A tenderer that does not submit the required returnable at stipulated deadline or submits an incomplete returnable; will not be disqualified but will score zero.

Returnable required prior to Contract Award.

Returnables that are mandatory for contract award must be submitted prior to award, completed if completion is a requirement and signed if signature is a requirement.

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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	Tenderers are required to submit the following: - Electronic copy of the tender in a PDF format. - Meet the eligibility criteria for a tenderer. - Fully completed pricing schedule. The price list needs to be submitted in a PDF and/ or a copy in excel format. (The upload size per document is 500 megabytes and total submission is restricted to 4 gigabytes) . NB: These returnable are required to be submitted with the tender at tender closing date and time. If not submitted by tender closing date and time, the tender will be disqualified.	✓		
Annexure A	Authorisation Form		✓	
Annexure B	Acknowledgement Form		✓	
Annexure C	Tenderers Particulars		✓	
Annexure D	Integrity Pact Declaration form		✓	
Annexure E	CPA for local goods/services (if applicable)		✓	
Annexure F	CPA(IG) for imported goods/services (if applicable)		✓	
Annexure G1-G4	SBD 6.2 -Declaration certificate for local production and content and Annexures G2,G3,G4	N/A	N/A	N/A
Annexure H (applicable for all suppliers including Foreign suppliers)	SBD 1- to be completed and submitted by all tenderers.		✓	
# Annexure I	SBD 6.1- Preference Points Claim Form in terms of PPPFA 2022 regulations		✓	
Annexure J	SBD 4 – Bidders Disclosure		✓	
Reverse e-auction training acknowledgement form (if applicable)		N/A	N/A	N/A

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Reference	Returnable From Suppliers	Returnable required at Tender closing (disqualifiable) *	Returnable required at Tender closing. (Non-disqualifiable) **	Returnable required prior to Contract Award.
E-tendering Help Manual acknowledgement form (If applicable)	E-tendering Help Manual is a guidance purposes and it is attached with the tender.	N/A	N/A	N/A
Additional Documents required in the 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.		✓	
	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	A tenderer's failure to submit proof that it meets the specific goals will not result in its disqualification. 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 required from foreign tenderers (with a footprint in South Africa but that are not registered on CSD and have not provided a SARS pin number) and local tenderers (that 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 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			✓

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Reference	Returnable From Suppliers	Returnable required at Tender closing (disqualifiable) *	Returnable required at Tender closing. (Non-disqualifiable) **	Returnable required prior to Contract Award.
Compliance with Employment Equity Act	To the extent that the tenderer falls within the definition of a “designated Employer” as contemplated in the Employment Equity Act 55 of 1998, the tenderer is required to furnish the Employer with proof of compliance with the Employment Equity Act, including proof of submission of the Employment Equity report to the Department of Labour. (South African tenderers only)			✓
CIDB (where applicable)	Valid proof of the required CIDB grading designation for the main contractor; JV and /or sub-contractor as may be required in the tender data at tender closing deadline or within 21 working days from the closing date of submission of tenders if this is agreed with the Employer	N/A	N/A	N/A
NEC or other Contract	Completed NEC 3 Professional Service Contract (PSC)		✓	
Pricing schedule	Completed pricing schedule in full. (if not already submitted in the NEC 3 Professional Service Contract (PSC)). For e-tendering price schedule needs to be submitted in PDF and/ or excel format. The upload size per document is 500 megabytes and total submission is restricted to 4 gigabytes.	✓		
Additional documents required (ECSA/ SACPCMP/CVs/ permits/licenses/ specific registration documents (if applicable to scope of work))		N/A	N/A	N/A

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Reference	Returnable From Suppliers	Returnable required at Tender closing (disqualifiable) *	Returnable required at Tender closing. (Non-disqualifiable) **	Returnable required prior to Contract Award.
	MANDATORY CONTRACTUAL REQUIREMENTS SUPPORTING EVIDENCE [applicable to all tenders]			
Mandatory Contractual Requirement	- CSD Registration (CSD number/CSD Report) - Tax Clearance Certificates A certified copy of a tax clearance certificate is required from foreign tenderers (with a footprint in South Africa but that are not registered on CSD and have not provided a SARS pin number) and local tenderers (that 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 complete the SBD1 document; however, no proof of tax compliance is required. - Tax Evaluation Questionnaire (Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE. - Compliance with Employment Equity Act - To the extent that the tenderer falls within the definition of a “designated Employer” as contemplated in the Employment Equity Act 55 of 1998, the tenderer is required to furnish the Employer with proof of compliance with the Employment Equity Act, including proof of submission of the Employment Equity report to the Department of Labour. (South African tenderers only).			√

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Reference	Returnable From Suppliers	Returnable required at Tender closing (disqualifiable)*	Returnable required at Tender closing. (Non-disqualifiable)**	Returnable required prior to Contract Award.
	ADDITIONAL CONTRACTUAL REQUIREMENTS SUPPORTING EVIDENCE.			
Safety	COIDA - Original certificate of good standing or proof of application issued by the Compensation Fund (COID) or a licensed compensation insurer (South African tenderers only)			✓
Quality Returnables	Refer to page 18 of this document.			✓
Safety Returnables	Refer to page 16 of this document.			✓
Environmental Returnables	Refer to page 17 of this document.			✓
Due Diligence/financial analysis	Refer to page 15 of this document.			✓
SDL&I	Refer to page 20 of this document.			✓
Planning and Scheduling Contractual Requirements	Refer to page 21 of this document.			✓
	DOCUMENTS REQUIRED UNDER FUNCTIONALITY/TECHNICAL CRITERIA			
Functionality/Technical [required for evaluation /scoring]	The technical evaluation is made up to two phases: Phase 1: Mandatory criteria evaluation and Phase 2: Functional criteria evaluation (Qualitative Evaluation). In order for the tenderer to be eligible for functional evaluation, the tenderer shall meet all the mandatory requirements. Once it has been determined that the tenderer has met all the mandatory criteria, the tenderer's returnable shall be subjected to the functional evaluation criteria.	✓		

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Phase 1: Mandatory Technical criteria evaluation (Disqualifiable).

The mandatory evaluation criteria act as a gatekeeper before the more detailed qualitative evaluation to protect Eskom against unacceptable risk.

Scoring for the mandatory evaluation is binary (compliant/non-compliant). A tenderer must comply with all mandatory criteria to be eligible for the qualitative evaluation.

Mandatory criteria are essential for assessing bids as they service as non-negotiable baseline requirements that ensure all bidders meet a minimum acceptable standard before their bids are considered further. For a bid to proceed to the function evaluation, the bid must obtain all "yes" for the below Mandatory criteria, should the bid obtain a "no" it will not proceed to the functional evaluation round.

Criteria No.	Criteria Description	Reference to Technical Specification / Tender Returnables	Motivation for Use
1.	Organisation Experience in Industrial C&I Field Design	The bidder proves that he/she, as an entity, has previously completed industrial instrumentation field designs and commissioning services in at least 3 reference projects, each from a different plant area, with completion letters / certificates and client contact details, each meeting the following criteria. (SoW Ref: 1.1.6) a) Must be an Industrial Process Plant. b) The installed I/O quantities > 500. c) Reference projects submitted must include scope of instruments and drives to marshalling cabinets or control system cabinets. Contact details to include client and plant at least two (2) contact persons (client employees) who can verify the tenderer's involvement on the reference plant/project. For each contact person the following must be provided: i. Name ii. Designation iii. Phone number iv. Backup phone number v. Email address	Deter ineligible consultants from tendering thereby preventing unnecessary tender development and evaluation costs and possible impact on the project schedule. Filter the tenders so that only consultants that have the minimum experienced are considered for qualitative technical evaluation.

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Criteria No.	Criteria Description	Reference to Technical Specification / Tender Returnables	Motivation for Use
2.	Design Sign-Off by Professionally Registered Engineering Personnel	The bidder demonstrates that all engineering designs produced for the project will be reviewed and signed off by a Professional Engineer (Pr Eng) or Professional Engineering Technologist (Pr Tech Eng) registered with the Engineering Council of South Africa (ECSA). (SoW Ref: 1.1.3.3) Evidence to include: - Identification of responsible engineer(s) for design approval and sign-off of each discipline (C&I, Electrical, Civil, Process/Mechanical) - Valid ECSA registration certificate(s) for the proposed signing engineer(s) - Confirmation in methodology or quality plan of formal design review and sign-off process	To ensure that all engineering designs are certified by suitably qualified and professionally registered personnel, thereby ensuring compliance with statutory requirements, Eskom standards, and accountability for design integrity. This aims to mitigate technical and safety risks and ensures legally compliant and auditable design approval practices.

Phase 2: Functionality (Qualitative Evaluation)

For a tender to be considered technically viable it must achieve a minimum threshold for the qualitative evaluation of greater than or equal to 80%.

Tenders that meet the minimum threshold are then ranked to identify the most technically viable tenders.

NR	CRITERIA	RETURNABLES / EVIDENCE	EVALUATION RANGE	WEIGHT
A.	PROJECT ORGANISATION AND RESOURCES			45%
1.	ELECTRICAL DESIGN The consultant / company has enough relevant projects completed in Industrial Electrical Design, Installation and Commissioning. (SoW Ref 1.1.6)	Portfolio of evidence with proof of Design, and Commissioning work completed successfully (e.g. previous invoices or Completion Certificates).	0 points: No experience records submitted. 2 points: ≤ 1 relevant project with partial evidence 4 points: ≤ 2 relevant projects with design + commissioning mostly demonstrated 5 points: > 3 relevant industrial projects evidenced with credible completion proof showing electrical design deliverables and commissioning/installation support completed successfully (portfolio demonstrates sufficient relevant electrical design + commissioning capability).	6%

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2.	CIVIL DESIGN & CONSTRUCTION QC The consultant / subcontractor has enough relevant projects completed in Industrial, Infrastructure or Commercial Building Civil Design and Construction Supervision or QC. (SoW Ref: 1.1.6)	Portfolio of evidence with proof of design and proof of Supervision or QC work completed successfully (e.g. previous invoices or Completion Certificates). Civil Design sign-off in your references is a must, else projects will not be considered.	0 points: No experience records submitted. 2 points: ≤ 2 projects with design scope in the reference list of work completed 4 points: ≥ 3 projects with design scope in the reference list of completed work. Civil sign-off demonstrated; supervision/QC evidence limited or not consistent across those projects. 5 points: ≥ 3 projects with both design and construction supervision or QC in the reference list of completed work	6%
3.	ENOUGH RESOURCES – C&I Provisions of enough and suitable resources for the Lead Discipline, C&I	CV of Engineering Manager. Experience on the project is verified via the CVs. (SoW Ref: 2.1.4.7)	0 points: No CVs or Engineering Manager has less than 8 years' related experience in Instrumentation project design, all referenced projects have less than 100 I/O. (Any of the above) 2 points: Engineering Manager has less than 10 years related experience in Instrument project design. Does not meet the minimum experience or project exposure requirements. Limited evidence of leading projects, and referenced projects are generally less than 500 I/O. (Any of the above) 4 points: Engineering Manager has a minimum of 10 years' related experience in Instrument project design, has led at least 1 project as Engineering Manager or Lead C&I Engineer, at least 2 of the referenced projects has > 500 I/O. (>15 years AND any 1 of the other two). 5 points: Minimum of 15 years' experience in instrumentation design. Has been involved in at least four projects (> 500 I/O) and led at least 2 projects as Engineering Manager or Lead C&I Engineer. At least one referenced project includes. Demonstrates proven leadership, experience across engineering and commissioning phases, and alignment with the Consultant's engineering practices, fully meeting the SoW requirements.	6%

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4.		CVs of Senior C&I Engineers, related to design process, QC during installation, experience on the proposed Field Instrumentation Design Tool. (SoW Ref: 2.1.4.8)	Evaluation will be conducted on a resource basis. Where the number of proposed engineers is less than the specified minimum requirement, the overall score will be negatively impacted. Where more than the minimum number of engineers are proposed, only the highest scoring engineers will be considered for evaluation. Each Engineer will be evaluated as follows: 0 points: No CV submitted, or less than 5 years' experience in instrumentation project design. 2 points: >5 years' experience but demonstrates limited design exposure. Evidence of field instrumentation design (I/O, marshalling, cable routing), commissioning involvement, or QA/QC during installation is insufficient or unclear. No experience with the proposed design tool is demonstrated. 4 points: ≥ 10 years' experience in C&I design with a relevant qualification. Demonstrates proven field instrumentation design capability and involvement in at least one full project including design and commissioning. Evidence of installation support or QA/QC is provided 5 points: ≥ 10 years' experience in C&I design with a relevant qualification and a combination of the following: Demonstrates proven field instrumentation design capability and involvement in at least one full project including design and commissioning. Evidence of installation support or QA/QC is provided. Experience with the proposed design tool. Professional registration (Pr Eng/Pr Tech Eng) and/or demonstrated understanding of SIL/SIF processes.	5%

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5.		CVs of C&I Engineers related to design process, QC during installation, experience on the proposed Field Instrumentation Design Tool. (SoW Ref: 2.1.4.8)	Evaluation will be conducted on a resource basis. Where the number of proposed engineers is less than the specified minimum requirement, the overall score will be negatively impacted. Where more than the minimum number of engineers are proposed, only the highest scoring engineers will be considered for evaluation. Each Engineer will be evaluated as follows: 0 points: No CV or less than 5 years of related experience in Instrumentation project design. 2 points: > 3 years in engineering/design. Limited exposure to instrumentation work and lacks depth in field instrumentation design. No or limited evidence of involvement in installation QA/QC, commissioning, or brownfield upgrade work. No experience with the proposed Field Instrumentation Design Tool. 4 points: ≥ 5 years' experience in instrumentation design and holds a relevant qualification. Proven experience in field instrumentation design, including I/O lists, cable routing, and marshalling. The engineer has participated in at least one C&I project involving design and installation or commissioning support, with evidence of QA/QC involvement. The engineer demonstrates the ability to assess existing installations and support upgrade or integration work in a brownfield environment. 5 points: ≥ 5 years' experience and demonstrates strong involvement across multiple C&I projects, including design, installation support, and commissioning activities. The CV shows solid experience in brownfield retrofit or complex industrial environments. The engineer has extensive experience with the proposed Field Instrumentation Design Tool and has played a key role in design development or implementation.	10%

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6.	ENOUGH RESOURCES – Provisions of enough and suitable resources for the Electrical Engineering Discipline	CVs of Electrical Engineers, Design Process and QC during Installation, plus commissioning experience. (SoW Ref: 2.1.4.9)	Evaluation will be conducted on an individual basis. Where the number of proposed engineers is less than the specified minimum requirement, the overall score will be negatively impacted. Where more than the minimum number of engineers are proposed, only the highest scoring engineers will be considered for evaluation. Each Engineer will be evaluated as follows: 0 points: No CV of Electrical Engineer or less than 3 years of related experience. 2 points: 3 to 4 years' experience in system design and lacks relevant project exposure. Limited involvement in electrical design activities and little or no evidence of QA/QC during installation or commissioning participation. 4 points: 5 years' experience in electrical design for industrial installations and holds a relevant qualification. Experience in power distribution design, cable routing, earthing, and bonding, and MCC/DB layouts. Involvement in installation support or QA/QC activities is provided. Familiarity with applicable standards is shown. Has participated in at least one project involving design and commissioning or site support activities. 5 points: > 5 years' experience and demonstrates strong involvement across multiple electrical design projects, including installation support and commissioning. Experience in complex or brownfield industrial environments, with solid application of SANS 10142 and related standards. Has led or significantly contributed to commissioning activities. Familiarity with safety instrumented systems and equipment selection, where applicable.	4%

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7.	ENOUGH RESOURCES – Civil Provisions of enough and suitable resources for the Civil Engineering Discipline	CV of Civil Engineer and QC Engineers during Installation. (SoW Ref: 2.1.4.10)	The Civil Engineer will be evaluated as follows: 0 points: No CV of Civil Engineer or less than 3 years of related experience. 2 points: > 4 years' experience in civil or structural design and limited experience Some exposure to design or construction activities but lacks depth in industrial refurbishment or modification projects. Evidence of construction support or QA/QC involvement is limited or unclear, and experience in assessing or modifying existing infrastructure is not adequately demonstrated. 4 points: ≥5 years' experience in civil or structural design and holds a relevant qualification. Evidence of construction support or QA/QC involvement is provided. Familiarity with building requirements relevant to control rooms or similar facilities and can support integration of electrical and C&I installations. Without providing evidence of experience in structural assessment and refurbishing or repurposing in industrial environment. 5 points: ≥ 5 years' experience in civil or structural design and holds a relevant qualification. Demonstrates experience in structural assessment and modifications within an industrial environment, including at least one project involving refurbishment or repurposing of existing infrastructure. Evidence of construction support or QA/QC involvement is provided. Familiarity with building requirements relevant to control rooms or similar facilities and can support integration of electrical and C&I installations.	4%

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8.	ENOUGH RESOURCES – Process Provisions of enough and suitable resources for the Process Engineering Discipline	CVs of Process/Mechanical Engineers related to design process, QC during installation, experience related to philosophy development. (SoW Ref: 2.1.4.11)	Each Engineer will be evaluated as follows: 0 points: No CV submitted or < 10 years relevant process or mechanical engineering experience in industrial plant environments. 2 points: > 10 years' experience in process or mechanical design within coal-fired or similar industrial environments. Limited exposure to boilers, turbines, and integrated plant systems is evident. Involvement in developing operating, control, or protection philosophies for at least one project. 4 points: ≥ 15 years' experience in process or mechanical design within coal-fired plant environments and holds a relevant qualification. Demonstrates development of operating, control, and protection philosophies for at least two projects and shows clear understanding of plant behaviour, system integration, and interaction with control systems. 5 points: ≥ 15 years' experience in process or mechanical design within coal-fired plant environments and holds a relevant qualification. Has been suitably trained and is qualified to produce operating, control and protection philosophies. Demonstrates development of operating, control, and protection philosophies for at least three projects and shows clear understanding of plant behaviour, system integration, and interaction with control systems.	4%
B.	DESIGN TOOL			8%

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1.	Design Tool Functionality	Design Tool selection specification / data sheet: The number of I/O, considering the total project. Tool has existing library with templates, AKZ coding and naming conventions, data structures, document formats (schematics, loop drawings, etc). Editable output documents in excel or .dwg as per Employer Requirements. (SoW Ref: 2.2.2.1 & 2)	0 points: No Field Instrumentation Design Tool mentioned at all 2 points: No specialised Field Design Tool mentioned, just the use of basic spreadsheet to develop the field design and loop drawings. Or design tool mentioned requires license subscription per I/O or regularly (less than 5-year frequency). 4 points: Design Tool is capable of being licenced for a full unit I/O count (at least 72,000 I/O in total and 12000 per unit), and this can be replicated 6 times without additional license costs, and license is valid for more than 10 years or lifetime for that specific version. Tool has built in templates library, supports Instrument coding, naming conventions, and multiple document formats, csv (excel), pdf and wiring schematics and loop drawings in dwg format. 5 points: Design Tool is capable of being licenced for all the project I/O list (at least 72 000 I/O in total and 12 000 per unit) in different unit projects. The license is for lifetime for that specific version. Tool has built in templates library, supports AKZ coding, naming conventions, and multiple document formats, csv (excel), pdf and wiring schematics and loop drawings in .dwg format. Tool can give customised instrument field design reports.	5%

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2.	Design Tool User Management Capabilities	Design Tool characteristics of multi-user collaboration, version control, access protocols and backup procedures. (SoW Ref: 2.2.2.3)	0 points: No Field Instrumentation Design Tool mentioned at all 2 points: Design Tool does not support multi-user collaboration, and no clear backup procedures during the project lifecycle mentioned. 4 points: Design Tool does not support multi-user collaboration, but has clear access protocols, version / revision control, and clear backup procedures described for the whole project lifecycle requirements. 5 points: Design Tool allows for multi-user collaboration, has clear access protocols, version / revision control, and clear backup procedures described for the whole project lifecycle requirements.	3%
C.	DESIGN METHODOLOGY			24%
1.	STAGE 1 Clarifications and Investigative Work (Note: All or portions of Method Statement can be included as part of the contract Works Information)	Methodology statements on Plant Investigations, specifically defined "As-is" verification process and outcomes . The Site Clarification meeting will also assist in getting insight into some of the systems listed. (SoW Ref: 2.2.1.3, 2.2.3 & 2.2.4)	0 points: No Stage 1 Method Statement on Investigation to be conducted. 2 points: Method Statement not detailing the Investigative work, locations and how Equipment selection decisions will be made 4 points: Method Statement clearly details how the Investigative work, including locations, will be done. Previous project examples are included. 5 points: Method statement is similar to 4 points above but is explicit on how any two (2) of the five (5) plant areas listed in section 2.2.1.3 will be investigated, referring to existing information and information picked during or after site clarifications.	8%

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2.	STAGE 2 Design Concepts	Methodology statements on Trade-off studies process and outcomes . Major concept alternatives to be investigated are discussed in this Stage. (SoW Ref: 2.3.2.2 and 2.3.2.3)	0 points: No Stage 2 in the Method Statement 2 points: Method Statement not detailing how the main Trade-Off studies for C&I Equipment location, thus impacting the cabling and power supply designs, will be conducted. 4 points: Method Statement clearly details how the main Trade-Off studies for C&I Equipment location, will impact the cabling and power supply designs, will be conducted during this Stage. 5 points: Method Statement is the same as 4 points above, but with added routes impacting time and cost analysis, as part of this Stage outputs. And example of cost and time analysis from previous projects is given.	5%
3.	STAGE 3 Conclude Designs Basic	Methodology statements on concluding Function Design Specification report. This is the basis of completing all the Detailed Designs in the next stage to a level of "Approved for Construction." (SoW Ref: 2.4.1.3 and 2.4.2)	0 points: No Stage 3 Method Statement on finalising the Functional Design Specification. 2 points: Method Statement not detailing the outputs of the Functional Design specification for C&I, Electrical and Civil designs. 4 points: Method Statement clearly details how the required outputs and a sample for each of 2.4.2.2, 2.4.2.3, 2.4.2.4, 2.4.2.7 and 2.4.2.13. 5 points: Method Statement clearly details how the required outputs and at least two samples for each of 2.4.2.2, 2.4.2.3, 2.4.2.4, 2.4.2.5, 2.4.2.7 and 2.4.2.13.	4%

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4.	STAGES 4 & 5 Complete Detailed Designs, Works Information & Installation Instructions for Package 2	Methodology statements describe the final detailed design outputs, as well as Works Information and Installation Instructions that will be used to source Package 2, the Installation Contractor. (SoW Ref: 2.5.2.1 and 2.6.2)	0 points: The outputs are mentioned but no typical samples from previous projects are given. 2 points: Only typical samples of 2.5.2.1.1, 2.5.2.1.2, 2.5.2.1.7, 2.5.2.1.12, 2.5.2.1.17. Only a mention of Works Information being developed in the previous projects, nothing more. 4 points: All in point 2 above plus typical samples of 2.5.2.1.5, 2.5.2.1.6, 2.5.2.1.9, 2.5.2.1.11, 2.5.1.14, 2.5.2.1.22, 2.5.2.1.23 and 2.5.2.1.26. Mention of both Works Information and Technical Evaluation criteria in previous projects. 5 points: All above in points 2 and 4 plus typical samples of 2.5.2.1.3, 2.5.2.1.13, 2.5.2.1.15, 2.5.2.1.27, and 2.5.2.1.31. Additional mention of a level 2 schedule and Commissioning QC Sheets.	7%
D.	DESIGN REQUIREMENTS UNDERSTANDING (INSTRUMENTATION, DCS INTERFACE, ELECTRICAL AND CIVIL)			17%
1.	Instrumentation Design Requirements (SoW Ref: Appendix 22). To be submitted in tabulated format, as an Annexure to the Methodology Statement required above in C, with the following columns: 1) Existing Design; 2) New Design Requirements / Scope; 3) Related Standard or LOSS; 4) Bidder capability to achieve requirement and 5) Risks identified / Other comments.	Understanding of design requirements, based on existing C&I installation, and what the project new design requirements are, and design outputs, including the related scope in Appendix 07, related standards (Eskom, SANS and international). (SoW Appendix 22 Ref: <u>3.1.11, 3.1.12, 3.1.13.1.3 & LOSS EA1-1, 3.1.13.1.14, 3.1.17 & LOSS BNR and 3.1.18 & LOSS HPB-1</u>)	0 points: Of the six (6) underlined SoW Reference points, none of the requirements are analysed in terms of understanding of design requirements as described in bold in the column to the left. 2 points: Of the six (6) underlined SoW Reference points, only one (1) is analysed in terms of understanding of design requirements as described in bold in the column to the left. 4 points: Of the six (6) underlined SoW Reference points, at most three (3) are analysed in terms of understanding of design requirements as described in bold in the column to the left. 5 points: Of the six (6) underlined SoW Reference points, at least five (5) are analysed in terms of understanding of design requirements as described in bold in the column to the left	7%

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2.	Electrical Design Requirements (SoW Ref: Appendix 22) To be submitted in tabulated format, with the following columns: 1) Existing Design; 2) New Design Requirements / Scope; 3) Related Standard or LOSS; 4) Bidder capability to achieve requirement and 5) Risks identified / Other comments	Understanding of design requirements, based on existing EC&I installation, and what the project new electrical design requirements are, and design outputs, including the related scope in Appendix 07, related standards (Eskom, SANS and international). (SoW Appendix 22 Ref: <u>4.1.2.2.2</u> , <u>4.1.3.4.2</u> , <u>4.1.3.4.3</u> & link to LOSS EA1-1 & 4.1.5.4, <u>4.1.3.6.1</u> , <u>4.1.3.12</u> , <u>4.1.10.2</u> SANS10142-1 & 2)	0 points: Of the six (6) underlined SoW Reference points, none of the requirements are analysed in terms of understanding of design requirements as described in bold in the column to the left. 2 points: Of the six (6) underlined SoW Reference points, only two (2) to three (3) are analysed in terms of understanding of design requirements as described in bold in the column to the left. 4 points: Of the six (6) underlined SoW Reference points, only four (4) to five (5) are analysed in terms of understanding of design requirements as described in bold in the column to the left. 5 points: Of the six (6) underlined SoW Reference points, all six (6) are analysed in terms of understanding of design requirements as described in bold in the column to the left	5%
3.	Civil Design Requirements (SoW Ref: Appendix 22) To be submitted in tabulated format, with the following columns: 1) Existing Design; 2) New Design Requirements / Scope; 3) Related Standard or LOSS; 4) Bidder capability to achieve requirement and 5) Risks identified / Other comments	Understanding of design requirements, based on existing layouts and civil designs, and what the project new electrical design requirements are, and design outputs, including the related scope in Appendix 07, related standards (Eskom, SANS and international). (SoW Appendix 22 Ref: <u>5.1.2.2</u> & link to Eskom std 240-56364545, <u>5.1.4.1.4</u> & link to Appendices 14 & 20, <u>5.1.4.3.1</u> , <u>5.1.16</u> & <u>5.1.17</u> .)	0 points: Of the four (4) underlined SoW Reference points, none of the requirements are analysed in terms of understanding of design requirements as described in bold in the column to the left. 2 points: Of the four (4) underlined SoW Reference points, only one (1) is analysed in terms of understanding of design requirements as described in bold in the column to the left. 4 points: Of the four (4) underlined SoW Reference points, at most two (2) are analysed in terms of understanding of design requirements as described in bold in the column to the left. 5 points: Of the four (4) underlined SoW Reference points, all four (4) are analysed in terms of understanding of design requirements as described in bold in the column to the left	5%
E.	C&I PROJECT COST ESTIMATION CAPABILITY			6%

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NR	CRITERIA	RETURNABLES / EVIDENCE	EVALUATION RANGE	WEIGHT
1.	C&I Project Cost Estimation Methodology (SoW Ref: 1.1.3.13)	Use of Cost Estimation Classification methods which are industry gold standards, coupled with definition levels of Engineering solutions, use of BoQ history and indices to achieve zero based cost estimates.	0 points: No method submitted 2 points: Basis on lumpsum previous projects without any equipment and labour breakdown analysis 4 points: Use of Project Definition to BoQ level status as basis of Cost Estimation. 5 points: Use of the method in point 4 above, plus a renowned history of typical BoQ's from past projects to establish some level of accuracy of the cost estimate.	3%
2.	C&I Project Cost Estimation References (SoW Ref: 1.1.3.13)	Relative experience in industrial control and instrumentation projects, with electrical and civil scopes of work.	0 points: No mentioned experience nor reference past projects 2 points: Previous experienced mentioned but without any details or references where the cost estimate was performed. 4 points: At least one C&I project cost estimate which was either awarded or within 10% of the award price is given with clear reference to items and scope of work. The level of definition before the cost estimate process began is given. 5 points: At least 2 reference projects where the scope was C&I plus electrical or civil scope which were either awarded or within 10% of the award price are given with clear reference to items and scope of work. The level of definition before the cost estimate process began is given for all reference projects.	3%
TOTALS				100%
Minimum qualifying threshold (≥ 80%)				

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ANNEXURE A

AUTHORISATION FORM

Indicate the status of the *tenderer* by ticking the appropriate box below.

A COMPANY	B CLOSE CORPORATION	C PARTNERSHIP	D JOINT VENTURE	E SOLE PROPRIETOR	F TRUST

The *tenderer* must complete the appropriate certificate set out below for its category of organisation. If the *tenderer* is a company, close corporation, joint venture, or trust the *tenderer* must attach a certified copy the document that is proof of the contents of the certificate (resolution of the board of directors of a company, members' resolution of a close corporation, power of attorney in the case of a joint venture, or resolution of the board of trustees of a trust).

Note further that, in addition to completing the relevant certificate for category of organisation, the authorised representative of the *tenderer* is also required to complete and sign the table at the end of this Authorisation Form.

A. Certificate for company

I, _____, in my capacity as _____ of the board of directors of _____, hereby confirm that by resolution of the board taken on _____ (date), Mr/Ms _____, acting in his/her capacity of _____, is authorised to submit this tender on behalf of the company, and to sign all documents in connection with this tender and any contract that may result from it on behalf of the company. A certified copy of the resolution of the board is annexed to this Form.

Signed:	Date:
Name:	Position:

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B. Certificate for close corporation

I, _____, in my capacity as member of _____, hereby confirm that by majority vote of the members taken on _____ (date), Mr/Ms _____, acting in his/her capacity of _____, is authorised to submit this tender on behalf of the close corporation, and to sign all documents in connection with this tender and any contract that may result from it on behalf of the close corporation. A certified copy of the members' resolution is annexed to this Form.

Signed:	Date:
Name:	Position:

C. Certificate for partnership

We, the undersigned, being the **key partners** in the business trading as _____ hereby authorise Mr/Ms _____, acting in his/her capacity of _____, to submit this tender on behalf of the partnership, and to sign all documents in connection with the tender and any contract that may result from it on behalf of the partnership.

Name	Address	Signature	Date

NOTE: This certificate is required to be completed and signed by the full number of Partners necessary to commit the Partnership. Attach additional pages if more space is required.

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D. Certificate for Joint Venture

We, the undersigned, are submitting this tender offer in Joint Venture and hereby authorise Mr/Ms _____, an authorised signatory of _____, being the lead member in the Joint Venture, to sign all documents in connection with the tender and any contract that may result from it on behalf of all the members in the Joint Venture.

This authorisation is evidenced by the attached power of attorney signed by the legally authorised signatories of all the members in the Joint Venture.

We attach to this Form a certified copy of the Joint Venture Agreement which incorporates a statement that all members in the Joint Venture are liable jointly and severally for the execution of the contract, a term that indicates which member will be the lead member, and terms that indicate the ratios according to which work and payment will be divided amongst the members.

Name of JV member	Address	Authorised signature, name and capacity
Lead member		
Member		
Member		
Member		

NOTE: This certificate is required to be completed and signed by all members of the joint venture. Attach additional pages if more space is required.

E. Certificate for sole proprietor

I, _____, hereby confirm that I am the sole proprietor of the business trading as _____

Signed:	Date:
Name:	Position:(Sole Proprietor)

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F. Certificate for trust

I, _____, in my capacity as _____ of the board of trustees of _____, hereby confirm that by resolution of the board of trustees taken on _____ (date), Mr/Ms _____, acting in his/her capacity of _____, is authorised to submit this tender on behalf of the trust and to sign all documents in connection with this tender and any contract that may result from it on behalf of the trust. A certified copy of the resolution of the board of trustees is annexed to this Form.

Signed:	Date:
Name:	Position:

NOTE: The table below must also be fully completed by all *tenderers* in addition to the certificate that was selected and completed above.

Name of tenderer:	
Full names of authorised signatory:	
Designation and capacity:	
Signature of authorised signatory	
Date of signature:	

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ANNEXURE B

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 Invitation to Tender ☐
2. We have already supplied Eskom with the cataloguing information pertaining to this Invitation to Tender in a previous contract/order [**insert previous contract/order number**] ☐ _____
3. We do not intend to provide the required cataloguing information for the reasons stated hereunder: ☐

4. We are a Distributor/Importer/Agent and our Principal, being the Original Equipment Manufacturer (OEM), is or is not in the position to supply cataloguing information for items. We attach the letter from the OEM confirming its position. ☐

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Name of Tenderer: _____

Country of registration: _____

Full names of contact person: _____

Contact details:

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

Name of tenderer:	
Full names of authorised signatory:	
Signature:	
Designation and capacity:	
Date:	

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ANNEXURE C

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 individual companies and each JV member) or trust number.	
VAT registration number (for individual companies and each JV member)	
CIDB registration number (for individual companies and each JV member), contractor grading designation (for individual companies and each 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 in the case of a JV)	

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

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1. If you are currently registered as a vendor with Eskom, please provide your Vendor registration

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

number with Eskom. _____

- If you are currently registered as a vendor on the National Treasury's Central Supplier Database (CSD), please provide your supplier registration number with Treasury _____
- Please note that it is not mandatory for you to be registered on National Treasury's CSD at the time of responding to this tender. It is, however, a mandatory requirement that you be registered on CSD prior to award.
- You may register online at National Treasury website on www.treasury.gov.za
- If you are registered on SARS E-filing system, please provide your PIN number in order to verify your tax compliance status _____

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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 E-filing PIN, please confirm that you have attached or will furnish a copy of a current valid tax compliance certificate as a tender returnable by contract award stage.

YES		NO	

7. **If sub-contracting is prescribed in the Invitation to Tender, tenderers must complete 7.1 to 7.9.**

7.1 Confirm if you intend sub-contracting

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

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

7.3 To whom do you intend sub-contracting? _____

7.4 Is the said sub-contractor registered on CSD?

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

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

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

7.7 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).

7.8 Please confirm that you have attached your signed intention to sub-contract document.

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

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

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

Name of tenderer:	
Full names of authorised signatory:	
Signature:	
Designation and capacity:	
Date:	

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ANNEXURE D

INTEGRITY DECLARATION FORM

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

1 DECLARATION OF INTEREST

I/We understand that an employee of the State as defined in the Public Service Act of 1994 is prohibited from conducting business with any organ of state and from being a director of a public or private company that conducts business with an organ of state.

I/We understand that any natural/legal person, including any natural legal person related to an Eskom employee/director as per the definition of “related” set out hereunder, may submit a tender to Eskom. However, in order to establish whether a conflict of interest exists tenderers are required to declare such interest/relationships where: -

1. the *tenderer/s* employees/directors are also employees/contractors/consultant's/ directors of Eskom.
2. the *tenderer/s* employees/directors are also employees/contractors/consultants or directors in another entity together with Eskom employees/consultants/contractor's/ directors.
3. the *legal entity including its employees'/contractors/ directors / shareholders /members /partners / owners* on whose behalf the tender documents are signed, is/are in some other way related to an Eskom employee/contractor/consultant/director involved in the tender specification/ tender evaluation/tender adjudication/negotiation.
4. the tenderer/s and one or more other tenderers in this tendering process have a controlling partner in common, or have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence over the tender/proposal of another tenderer, or influence over the decisions of Eskom regarding the bidding process;

Related:

(1) When used in respect of two persons, means persons who are connected to one another in any manner contemplated below:

- (a) an individual is related to another individual if they-
 - (i) are married, or live together in a relationship similar to a marriage; or
 - (ii) are separated by no more than two degrees of natural or adopted consanguinity or affinity.

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- (b) 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 set out in subsection (2) below; and
- (c) a juristic person is related to another juristic person if-
 - (i) either of them directly or indirectly controls the other, or the business of the other, as determined in accordance with subsection (2) below.
 - (ii) either is a subsidiary of the other; or
 - (iii) a person directly or indirectly controls each of them, or the business of each of them, as determined in accordance with subsection (2) below.

“related person”, when used in reference to a directors/shareholders/members/partners/owners, has the meaning set out in 3.3.16, but also includes a second company of which the directors/shareholders/members/partners/owners or a related person is also a director directors/shareholders/members/partners/owners, or a close corporation of which the director or a related person is a member.

Control:

- (2) For the purpose of subsection (1) above, a person controls a juristic person, or its business, if-
 - (a) in the case of a juristic person that is a company-
 - (i) that juristic person is a subsidiary of that first person, as determined in accordance with the Companies Act¹; or
 - (ii) that first person together with any related or inter-related person, is-
 - (aa) directly or indirectly able to exercise or control the exercise of a majority of the voting rights associated with securities of that company, whether pursuant to a shareholder agreement or otherwise; or
 - (bb) has the right to appoint or elect, or control the appointment or election of, directors of that company who control a majority of the votes at a meeting of the board.
 - (b) in the case of a juristic person that is a close corporation, that first person owns the majority of the members’ interest, or controls directly, or has the right to control, the majority of members’ votes in the close corporation.

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- (c) in the case of a juristic person that is a trust, that first person has the ability to control the majority of the votes of the trustees or to appoint the majority of the trustees, or to appoint or change the majority of the beneficiaries of the trust; or
- (d) that first person has the ability to materially influence the policy of the juristic person in a manner comparable to a person who, in ordinary commercial practice, would be able to exercise an element of control referred to in paragraph (a), (b) or (c) of subsection (2).

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

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

If any employee/director/member/shareholder/owner of the tenderer/s is also currently employed by Eskom, state whether this has been declared and whether there is authorisation to undertake remunerative work outside public sector employment and attach proof to this declaration. _____[Yes/No]

Do the tenderer/s and any other tenderer/s in this tendering process share a controlling partner or have any relationship with each other, directly or through common third parties? _____[Yes/No]

If Yes, attach proof. to this declaration

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2 DECLARATION OF FAIR TENDERING PRACTICES

The tenderer declares that it has taken all reasonable steps to address and prevent the exploitation of the procurement process and the use of any unfair tendering practices.

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

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

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

Item	Question	Yes	No
1.1	Is the tenderer/s or any of its shareholders/ directors/ members/ partners/ owners/ trustees/ beneficiaries listed on National Treasury's Database of Restricted Suppliers as companies/persons prohibited from doing business with the public sector. The Database of Restricted Suppliers can be accessed on the National Treasury's website (www.treasury.gov.za).		
1.2	Is the tenderer/s or any of its shareholders/directors/members/partners/owners/trustees/beneficiaries 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) The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za).		
1.3	Was the tenderer/s or any of its shareholders/directors/members/partners/owners/trustees/beneficiaries convicted by a court of law (including a court outside South Africa) of fraud and/or corruption in respect of any procurement/tendering processes/procedures during the past five years?		
1.3.1	If "Yes", provide details including a case number and a copy of the judgement.		
1.4	Was the tenderer/s or any of its shareholders/ directors/ members/ partners/ owners/ trustees/ beneficiaries prohibited from doing business with any International Financial/Lending Institution or Development/ Funding Agency?		
1.5	Is there any history/record of the tenderer/s or any of its shareholders/directors/members/partners/owners/trustees/beneficiaries failing to meet their contractual obligation with the State or any State Owned Entity(SOC)?		
1.5.1	If "Yes", provide details		
1.6	Is the tenderer/s or any of its directors restricted by Eskom?		

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3. DECLARATION OF SHAREHOLDING / BENEFICIARY INFORMATION

I, the undersigned _____ [Full names and 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 / Beneficiaries
in _____ [Name of Tenderer]:

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

Individuals:

Full Name	Identity Number	Shareholding Percentage Beneficiary Share /

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Other Entities*:

Full Legal / Trading Name	Entity Registration Number/Trust Number	Shareholding Percentage / Beneficiary Share	Full name and surname of the /shareholders/ directors/ trustees/ beneficiaries of the shareholding entity	Identification Numbers of the shareholders/directors/ trustees/beneficiaries of the shareholding entity

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

Name of Tenderer:	
Full names of authorised signatory:	
Signature:	
Designation and capacity:	
Date:	

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Joint Ventures

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

I give my consent for this information to be used for the purposes 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.

Name of Tenderer:	
Full names of authorised signatory:	
Signature:	
Designation and capacity:	
Date:	

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ANNEXURE E

CONTRACT PRICE ADJUSTMENT (CPA) REQUIREMENTS FOR LOCAL GOODS AND SERVICES.

The application of contract price adjustment (CPA) to tender submissions

Note: This Section will not be applicable to Professional services contracts (See relevant section hereunder for guidelines on this).

1. Application of CPA

- 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.
- For contracts with a duration more than twelve (12) months, CPA will not be applicable for the first year. CPA will then only be applied from year two (2) onwards.
- Failure to propose contract price adjustment, or submit a CPA formula with the tender submission, will result in the pricing being considered fixed.
- Eskom will not accept Rate of Exchange adjustment to be included in any CPA formula.
- Local indices may not be used for CPA purposes for any imported component.
- There must be separate CPA formulae for local and foreign CPA. Local and foreign escalation may not be combined into one formula.

2. Tender Submissions

[Procurement Practitioner/QS to populate table hereunder as per scope of work for relevant Tender]

Eskom Proposed CPA breakdown for Local Goods and Service

Formula A						
Index Reference	Proposed portions/Weightings of each index	Description of Index	Full Title of Index published	Source Publisher of Index	Base Month	Base Price/Base Index Figure
A1						
A2						
A3						
	15%	Fixed portion not subject to CPA				
Total	100%					

Note: Tenderers to take note that, if the Eskom proposed CPA breakdown is not populated, they are required to refer to the Pricing Schedule in the NEC or other Contract or standalone Pricing Schedule for Eskom's proposed CPA breakdown.

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Eskom CPA Conditions/Requirements

- Tenderers are required to submit CPA that is aligned to Eskom's proposed CPA breakdown in this Tender; or Tenderers may submit an alternative CPA proposal from Eskom's CPA proposal, and this will be considered if deemed acceptable to Eskom;
- Note that for contracts exceeding a duration of 12 months if there is no CPA catered for by the tenderer; then prices will be deemed to be fixed and firm.
- A minimum of 15% of the total agreement value is to be fixed when a CPA formula is applied,
- Each CPA formula must add up to a final total of 100.
- Only official published CPA indices that are in the public domain must be used.
- No in-house indices may be used for CPA.
- There may be more than 1 CPA formula (Formula A, B, C etc) or a combination of all the cost components into 1 Formula (depending on how the pricing is to be submitted).
- If there are specific line items for Labour and Transport, individual Formulae might be used.

Note: Eskom reserves the right to negotiate CPA terms and conditions during negotiations held with tenderers.

3. BASE DATE AND BASE PRICE

- In instances of indices or other references published monthly, the Base Date is to be the month before the month in which the tender closes.
- In instances where the reference figures, e.g. market prices, are published daily or at intervals more than once a month; then the average for the month before the month in which the tender closes should be used as the Base Price.

4. 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 contract 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.

OR

Closing date of tender:	
Name of tenderer:	
Full names of authorised signatory:	
Signature:	
Date of signature:	

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ANNEXURE F

CPA (IG) REQUIREMENTS FOR FOREIGN GOODS AND SERVICES

The application of contract price adjustment (CPA) to tender submissions

Note: This Section will not be applicable to Professional services contracts (See relevant section hereunder for guidelines on this).

1. Application of CPA

- 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.
- For contracts with a duration more than twelve (12) months, CPA will not be applicable for the first year. CPA will then only be applied from year two (2) onwards.
- Failure to propose contract price adjustment, or submit a CPA formula with the tender submission, will result in the pricing being considered fixed.
- Eskom will not accept Rate of Exchange adjustment to be included in any CPA formula.
- Local indices may not be used for CPA purposes for any imported component.
- There must be separate CPA formulae for local and foreign CPA. Local and foreign escalation may not be combined into one formula.

2. Tender Submissions

[Procurement Practitioner/QS to populate table hereunder as per scope of work for relevant Tender]

Eskom Proposed CPA breakdown for Foreign Goods and Service

Formula A						
Index Reference	Proposed portions/Weightings of each index	Description of Index	Full Title of Index published	Source Publisher of Index	Base Month	Base Price/Base Index Figure
A1						
A2						
A3						
	15%	Fixed portion not subject to CPA				
Total	100%					

Note: Tenderers to take note that, if the Eskom proposed CPA breakdown is not populated, they are required to refer to the Pricing Schedule in the NEC or other Contract or standalone Pricing Schedule for Eskom's proposed CPA breakdown.

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Eskom CPA Conditions/Requirements

- Tenderers are required to submit CPA that is aligned to Eskom's proposed CPA breakdown in this Tender; or Tenderers may submit an alternative CPA proposal from Eskom's CPA proposal and this will be considered if deemed acceptable to Eskom;
- Note that for contracts exceeding a duration of 12 months if there is no CPA catered for by the tenderer; then prices will be deemed to be fixed and firm.
- A minimum of 15% of the total agreement value is to be fixed when a CPA formula is applied,
- Each CPA formula must add up to a final total of 100.
- Only official published CPA indices that are in the public domain must be used.
- No in-house indices may be used for CPA.
- There may be more than 1 CPA formula (Formula A, B, C etc) or a combination of all the cost components into 1 Formula (depending on how the pricing is to be submitted).
- If there are specific line items for Labour and Transport, individual Formulae might be used.

Note: Eskom reserves the right to negotiate CPA terms and conditions during negotiations held with tenderers.

3. BASE DATE AND BASE PRICE

- In instances of indices or other references published monthly, the Base Date is to be the month before the month in which the tender closes
- In instances where the reference figures, e.g. market prices, are published daily or at intervals more than once a month; then the average for the month before the month in which the tender closes should be used as the Base Price.

4. 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 contract 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.

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PAYMENT OF FOREIGN COMMITMENTS

PART 1: The application of importation payment requirements to tender submissions.

Where foreign exchange is involved, Eskom will take measures to mitigate any exposure to foreign currency exposure or exchange rate risk.

Tenderers: -

- Who wish to submit tenders with pricing in foreign currency for imported goods/services must establish **prior** to tender close (via the Procurement Practitioner), that the foreign currency that is being priced in the submission, is an acceptable foreign currency to Eskom.
- Who are pricing for imported goods/services in a foreign currency or linking their pricing of goods to a foreign currency exchange rate, **must be the direct importers** of the goods/services. For payment purposes, Eskom will require proof of importation.
- Who import goods into stock, 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.
- Who have submissions where pricing for imported goods/services in a foreign currency or linked to a foreign currency exchange rate, must ensure that their pricing indicates the foreign currency and the foreign currency values.

Tenderers should note that all domestic value-added process, i.e., costs incurred in the Republic of South Africa, for example, transport costs will only be paid in Rands.

Tenderers who have submitted tenders, which have goods/services priced, are linked to a foreign currency or exchange rate, are required to select one of the payment methods indicated below for the payment relating to those imported goods/services:

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 OR Eskom SOC Limited must be the direct importer of the goods

Documentation to be submitted with payment:

- Commercial invoice (from the foreign supplier)

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Import payments

- SAD 500
- Bill of Entry as evidence that goods have been cleared by the Department of Customs and Excise
- Customs release notification
- Transport documents from the freight company
- Marine/ ocean bill of lading

Any one of the following documents as per the mode of transportation: -

- Airway bill / air transport document
- Road or rail consignment note.
- Postal receipt "goods despatched".
- Certificate of posting
- Courier dispatch note or air waybill.

NB: Evidencing transport of the relative goods to the Republic of South Africa

Service- related payments

Documents to submit with payment:

- Commercial invoice (invoice from the overseas supplier)

OR

Payment Method 1B:

To a valid SARB approved CFC account in South Africa, in a foreign currency (payment will be made to the contracting party)

Please note:

- The contracting party must be the direct importer.
- For payment purposes, Eskom will require both the foreign (commercial) invoice and the local tax invoice.
- The foreign currency values on both the commercial and local invoice must match. Eskom will not pay any profit in foreign currency. (Please note that the commercial invoice used in the clearance of the imported goods must be from the country of origin)
- If Payment Method 1B is the option selected for the payment for any imported goods/services, then the following documentation is to be submitted with your submission:
 - Copy of tenderers bankers' initial application to the Reserve Bank requesting approval to invoice a local entity or Eskom, and for Eskom to pay the invoiced currency into the contracting party's CFC account.
 - Copy of the response from the Reserve Bank regarding the initial application, on the Reserve Bank's letterhead
 - Copy of the latest application to the Reserve Bank to renew the approval.

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- Copy of the response from the Reserve Bank to the application to renew the approval to invoice Eskom in foreign currency.

Documents to submit with payment:

- Commercial invoice (from the foreign supplier, country of origin and used to clear the goods)
- Local invoice or Tax invoice
- Both the commercial invoice and local invoices must match

Import payments

- SAD 500
- Bill of Entry as evidence that goods have been cleared by the Department of Customs and Excise
- Customs release notification
- Transport documents from the freight company

Any of the following documents as per the mode of transportation: -

- Marine/ ocean bill of lading
- Airway bill / air transport document
- Road or rail consignment note.
- Postal receipt
- Certificate of posting
- Courier dispatch note or air waybill.

NB: Evidencing transport of the relative goods to the Republic of South Africa
All documents submitted to Eskom should not have any alterations.

The information on the documents should be as originally issued from the authorities, freight companies and overseas suppliers.

Service-related payments

- Should a supplier select this option, they are required to provide proof that the South African Reserve Bank has given them approval to invoice Eskom in foreign currency for services related payments and to receive foreign currency proceeds into that CFC account. The proof would consist of: -
 - A copy of a letter from the supplier's bankers to the Reserve Bank requesting authority to receive services related payments to be made into a CFC account.
 - A copy of the official response from the Reserve Bank authorising payments to be made into the supplier's CFC account. The supplier's documents to the Reserve Bank must make specific reference to Eskom.
- This approval is only valid for a period of 1 year or as per SARB approval period.

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Documents to submit with payment:

- Commercial invoice (invoice from the overseas supplier to proof that we have foreign currency exposure)
- Local Tax invoice (from the local supplier)
- Both the commercial invoice and local invoices must match

NB: If a supplier is unable to produce or provide Eskom with a commercial invoice, the contract will be concluded in rands. The contract cannot be linked to any Exchange Rate.

OR

Payment Method 2:

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

Please note:

- The contracting party must be the direct importer of the goods.
- This payment option is not applicable for the payment of services
- Tenderers are required to indicate and request approval from Eskom to use Payment Method 2 **prior to tender close**. Where a tenderer has failed to obtain the required approval prior to tender close, the tenderer will have to select one of the other Payment Methods indicated in this document.
- Together with their submission, Tenderers will be required to provide Eskom with a written indemnity confirming that they will not buy and forward cover.,

Documents to submit with payment:

- Commercial invoice (from the foreign supplier)
- SAD 500
- Bill of Entry as evidence that goods have been cleared by the Department of Customs and Excise
- Customs release notification
- Transport documents from the freight company

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Any of the following documents as per the mode of transportation: -

- Marine/ ocean bill of lading
- Airway bill / air transport document
- Road or rail consignment note
- Postal receipt
- Certificate of posting
- Courier dispatch note or air waybill

NB: Evidencing transport of the relative goods to the Republic

- Local invoice or Tax invoice

NB: If a supplier is unable to produce or provide Eskom with a commercial invoice, the contract will be concluded in rands. The contract cannot be linked to any Exchange Rate.

OR

Fixed ZAR Option (Payment Method 3)

This option is available to those tenderers who are the direct importers of the goods/services for which they have tendered, but do not find Payment Methods 1A, 1B or 2 and allows tenderers to be responsible for the foreign currency and exchange rate risk. If a tenderer selects this payment method, the process is as follows:

- Eskom and the successful tender will engage, on a simultaneous basis, with their respective bankers and compare the exchange rate/s obtained. This is done to ensure that any exchange rate/s used is/are market related.
- Tenderers will be required to match or better the exchange rate/s obtained by Eskom. If the tenderer's exchange rate/s is/are more expensive than the exchange rate/s indicated by Eskom, the exchange rate/s to convert the foreign values into ZAR will be the Eskom exchange rate/s.
- Once the exchange rate/s has/have been agreed by both parties, Eskom will not be liable for any further exchange rate adjustments.

From a Commercial perspective, please take note of the following:

- The foreign currency and foreign currency amount/s that Eskom is/are at risk to, need/s to be indicated in the pricing schedule submitted as part of the tender. If the pricing schedule does not allow for it, the foreign currency and foreign currency amount/s must be indicated in a covering letter.
- The exchange rate to be used in the tender submission is the exchange rate sourced from the South African Reserve Bank on the date the tender is advertised/published.

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- Due to the payments being made in ZAR, but based on an agreed exchange rate, the tenderer will be required to submit proof of importation at time of payment.

Documents to submit with payment:

- Commercial invoice (from the foreign supplier)
- Local invoice or Tax invoice

Import payments

- SAD 500
- Bill of Entry as evidence that goods have been cleared by the Department of Customs and Excise
- Customs release notification
- Transport documents from the freight company

Any of the following documents as per the mode of transportation: -

- Marine/ ocean bill of lading
- Airway bill / air transport document
- Road or rail consignment note.
- Postal receipt
- Certificate of posting
- Courier dispatch note or air waybill.

NB: Evidencing transport of the goods to the Republic of South Africa

Documents to submit with payment:

- Commercial invoice (invoice from the overseas supplier to proof that we have foreign currency exposure)
- Local Tax invoice (from the local supplier)

NB: If a supplier is unable to produce or provide Eskom with a commercial invoice, the contract will be concluded in RAND's Not in Currency

Please note: Eskom will require substantiating proof of importation at the time of invoicing.

Where the supplier, previously imported goods into stock 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.

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Take note of the following:
Service-related payment:

When specialist skills are required in South Africa, the local supplier will source the appropriate talent from their network of specialist companies overseas. The specialist is then brought into the country (South Africa) on one of two possible methodologies.

1) **Secondment**

In this approach, the foreign specialist retains their employment contract with their home unit (Employer overseas) but are seconded to the local company that has a contract with Eskom to work under the direction and control of the local management. Their salaries are paid to the foreign specialist by their home country and that foreign entity then invoices the local supplier (South Africa) in foreign currency for the cost relating to such employees. The invoices would typically be in Euro or GBP, this methodology is usually for short to medium term engagements.

Documents to be attached for payment:

- Commercial invoice from the specialist company
- Local invoice (South African company making use of the specialist services)
- Passport of the specialist and valid work permit
- Activity schedule signed by the contract manager.

2) **Payroll Transfer**

In this approach, the employee's contract with the overseas employer will be suspended and the specialist takes up a local contract with the local company. The remuneration is then **ZAR** based, the overseas employer is unable to provide the foreign invoice because the employment with the specialist is suspended this methodology is usually favoured for long term engagement. There is no foreign commitment, and the contract will be in ZAR.

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.

Date of advertisement of tender:	
Closing date of tender:	
Name of tenderer:	
Full names of authorised signatory:	
Signature:	
Date of signature:	

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ANNEXURE G1

SBD 6.2

DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS

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

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

1. General Conditions

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

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

Where:

x is the imported content in Rand

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

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

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

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

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

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

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

(Tick applicable box)

YES	☐	NO	☐
-----	--------------------------	----	--------------------------

3..1 If yes, the rate(s) of exchange to be used in this bid to calculate the local content as prescribed in paragraph 1.5 of the general conditions must be the rate(s) published by SARB for the specific currency at 12:00 on the date of advertisement of the bid.

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

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

Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

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

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

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

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

IN RESPECT OF BID NO.

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

.....
NB

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

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

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

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

If the bid is for more than one product, the local content percentages for each product contained in Declaration C shall be used instead of the table above.

The local content percentages for each product has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E.

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

SIGNATURE: _____

DATE: _____

WITNESS No. 1 _____

DATE: _____

WITNESS No. 2 _____

DATE: _____

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ANNEXURE H

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					
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS			E-MAIL 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					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					

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IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?	☐ YES ☐ NO
DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.	

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PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA .
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

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ANNEXURE I

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

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

1.2 To be completed by the organ of state

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

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

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

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

- 1.5 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.
- 1.6 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.

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2. DEFINITIONS

- (a) **“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;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“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
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 \mathbf{Ps} = \mathbf{80} \left(\mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right) & \mathbf{or} & \mathbf{Ps} = \mathbf{90} \left(\mathbf{1} - \frac{\mathbf{Pt} - \mathbf{Pmin}}{\mathbf{Pmin}} \right)
 \end{array}$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10}
 \end{array}$$

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. 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—
- (a) 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
 - (b) 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.)

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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 allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. 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:

i) The information furnished is true and correct;

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- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) 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 –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the 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
 - (e) forward the matter for criminal prosecution, if deemed necessary.

..... SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	
DATE:	
ADDRESS:	

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ANNEXURE J

SBD 4

TENDERER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to tender . 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, Eskom requires the tenderer 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, including Restriction by Eskom, that person will automatically be disqualified from the tender process.

2. TENDERER'S DECLARATION

2.1 Is the tenderer or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest 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 the table below.

Full Name	Identity Number	Name of State Institution

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2.2 Do you, or any person connected with the tenderer, have a relationship with any person who is employed by the procuring institution?

[YES/NO]

If so, furnish particulars:

.....
.....

2.3 Does the tenderer 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]

If so, furnish particulars:

.....
.....

3. DECLARATION

I, the undersigned, (name)..... in submitting the accompanying tender, 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 tender will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The tenderer has arrived at the accompanying tender independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium will not be construed as collusive bidding.
- 3.4 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 tender, tendering with the intention not to win the tender and conditions or delivery particulars of the products or services to which this tender invitation relates.

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- 3.5 The terms of the accompanying tender have not been, and will not be, disclosed by the tenderer, directly or indirectly, to any competitor, prior to the date and time of the official tender opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the tenderer with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the tender submitted where so required by the institution, and the tenderer was not involved in the drafting of the specifications or terms of reference for this tender.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, tenders 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 the tenderer maybe 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 TENDER OR ACT AGAINST THE TENDERER 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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