

	<b>Invitation to Tender</b>	Template Identifier	240-114238630	Rev	8
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		Effective Date	22 November 2019		
		Review Date	November 2022		

**ESKOM HOLDINGS SOC LTD**

**INVITATION TO TENDER**


**Supply and delivery of dosing chemicals for cooling water system at Matla Power Station on an as and when required basis for period of five years**

<b>Tender number</b>	<b>MPMAT10498GX</b>
<b>Issue date</b>	<b>24 October 2022</b>
<b>Closing date and time</b>	<b>24 November 2022 at 10h00</b>
<b>Tender validity period</b>	<b>120 days from the closing date and time</b>
<b>Clarification meeting NOT COMPULSORY</b>	<p><b>Date: 01 November 2022</b>  <b>Time: 10h00 am</b>  <b>Venue: Ms Teams</b>  <b>Link: <u>Requested via email before 07 October 2022</u></b></p> <p><b>Site visits can be organized by a formal appointment only send to:</b>  <u>MpatJP@eskom.co.za</u></p>
<b>Tenders are to be delivered to the following address on the stipulated closing date and time:</b>	<p><b>Eskom Tender Box, Ground Floor</b>  <b>No.10 Smuts Avenue</b>  <b>Witbank/ Emalahleni</b>  <b>Mpumalanga</b></p> <p><b>GPS CO-ORDINATES</b>  <b>LATITUDE: 25.87723S</b>  <b>LONGITUDE: 29.21629E</b></p>
<b>Precautionary measures to be taken on delivery of Tender documents</b>	<b>Tenderers shall ensure all precautionary measures to prevent the spread of Covid 19 virus as issued by the Department of Health or as prescribed by the Disaster Management Act and other relevant authorities are undertaken when tender documents are transported and delivered at Eskom Tender Offices.</b>

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### Invitation to Tender/Request for Proposal

Eskom Holdings SOC Ltd (hereinafter "Eskom") **invites you to Supply and delivery of dosing chemicals for cooling water system at Matla Power Station on an as and when required basis for period of five years**


The enquiry documents are supplied to you on the following basis

- Free of charge

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

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

Yours faithfully



Neo Mkhize


Procurement Manager

Date 2022/10/24

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The following documents listed hereunder are attached to this enquiry

Number	Description	Annexure/to be downloaded and attached	Attached (Y/N)
6 1	*Acknowledgement form	Annexure A	Y
6 2	*Tenderer's particulars	Annexure B	Y
6 3	* Integrity Declaration Form (refer to <a href="http://www.eskom.co.za">www.eskom.co.za</a> for the Supplier Integrity Pact that suppliers are required to download and read )	Annexure C	Y
6 4	CPA Requirements for Local Goods/Services	Annexure D	Y
6 5	CPA(IG) for Foreign Goods/Services (if applicable)	Annexure E	Y
6 6	SBD 6 2- Declaration Certificate for Local Production and Local Content (only applicable if designated materials are included)	Annexure F1	Y
	Annexure C-Local Content Declaration-Summary Schedule	Annexure F2	
	Annexure D-Imported Content Declaration – Supporting Schedule to Annexure C	Annexure F3	
	Annexure E-Local Content Declaration-Supporting Schedule to Annexure C	Annexure F4	
6 7	SBD 1 -Invitation to Bid must be filled out by all tenderers and submitted with the tender at tender submission deadline	Annexure G	Y
6 8	SBD 6 1- Preference Points Claim Form in terms of PPPFA 2017 regulations	Annexure H	Y
6 9	Tax Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE <b>[only to be attached for services type of contracts]</b>	Attached	

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6 10	Supplier Development & Localisation (SDL&I)	Annexure J	N
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- 1 2 The Tender Data makes several references to the **Eskom Standard Conditions of Tender** and in those instances, the clause numbers are referenced hereunder. If the **Eskom Standard Conditions of Tender** is not attached to the **Invitation to Tender/Request for Proposal**; then the tenderers are required to download this from [www.eskom.co.za](http://www.eskom.co.za). The **"Tender Data"** as detailed herein shall take precedence over the **Standard Conditions of Tender** in the event of any ambiguity or inconsistency between the two documents.

Clause Number from Standard Conditions of Tender	Tender Data
1 1 Parties	<p>The <i>Employer</i> is <b>Eskom Holdings SOC Ltd</b></p> <p>The Eskom <i>Representative</i> is  Name. <b>Phasika Mpati</b>  Tel <b>017 612 6402</b>  E-mail <a href="mailto:MpatiJP@eskom.co.za">MpatiJP@eskom.co.za</a></p>
1.3 Enquiry documents	<p>The Invitation to tender /RFP number is <b>MPMAT10498GX</b></p> <p>See the content list above for the enquiry documents</p>
1 4 Type of Invitation to Tender/RFP	<p>This invitation to tender is:</p> <p>1 An open Invitation to tender</p>
1 6 Eskom's rights to accept or reject any tender	<p>The tender shall be for the whole of the contract</p>
2 1 Eligible tenders	<p>Submit a tender only if the tenderer (whether a single company or a structure similar to a Joint Venture) complies with the <i>eligibility criteria</i> stated in the Tender Data and the tenderer, or any of his principals, is not under any restriction to do business with Eskom/State Owned Companies</p> <p>Tenderers are deemed <b>ineligible</b> to submit a <b>tender</b> if</p> <ul style="list-style-type: none"> <li>Tenderers have the nationality of a country on any international sanctions list. A tenderer shall be deemed to have the nationality of a country if the tenderer is a national or is constituted, incorporated, or registered and operates in conformity with the provisions of the laws of that country. This</li> </ul>

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	<p>criterion shall also apply to the determination of the nationality of proposed subcontractors or suppliers for any part of the Contract including related services</p> <ul style="list-style-type: none"> <li>• Tenderers submit more than one [tender/proposal] either individually or as a partner in a joint venture (JV) or consortium</li> <li>• [Tenders/proposals] submitted by a JV or consortium where the JV/consortium agreement does not explicitly state that the parties of the JV or consortium shall be jointly and severally liable for the execution of the Contract in accordance with the Contract terms</li> <li>• A Tenderer must not have a conflict of interest All Tenderers found to have a conflict of interest shall be disqualified A Tenderer may be considered to have a conflict of interest with one or more parties in this [tendering/RFP] process, if <ul style="list-style-type: none"> <li>◦ (a) they have a controlling partner/majority shareholder in common, or</li> <li>◦ (b) they have a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another Tenderer or influence the decisions of the Employer regarding this bidding process</li> </ul> </li> <li>• Tenders signed by non- authorized persons</li> <li>• Where the tenderers are not registered on National Treasury's Central Supplier Database (except Foreign Suppliers)</li> <li>• A tender that fails to meet any pre-qualifying criteria stipulated in the tender documents is an unacceptable tender (section 4 (2) of PPPFA Regulations</li> <li>• Any tenderer that is restricted by National Treasury</li> <li>• A tenderer that sub-contracts 100% Scope of Work</li> </ul> <p><b>Ineligible tenderers will be disqualified.</b></p>
2.2 - 2.5 Tender Closing	<p>The deadline for <b>Tender</b> submission is  Date <b>24 November 2022</b>  Time <b>10:00 am</b></p> <p><b>Late Tenders will not be accepted</b></p>

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	<p>Tenders are to be submitted to the Eskom tender box at the following physical address</p> <p><b>Eskom Tender Box, Ground Floor No.10 Smuts Avenue Witbank/ Emalahleni Mpumalanga</b></p> <p><b>GPS CO-ORDINATES LATITUDE: 25.87723S LONGITUDE: 29.21629E</b></p>
2 9 Copy of original tender	<p>The tenderer shall submit an <b>original tender</b>, plus <b>one (01) hard copy</b> of the original tender at tender submission deadline</p> <p>Where a Tenderer does not submit <b>one (01) original tender</b> plus <b>one (01) hard copy</b> of the original tender at tender submission deadline, the tenderer will be disqualified</p>
2 13 Tender Validity Period	The tender validity period is <b>120 days from the closing date and time</b>
2 16 Site/clarification meetings	A site meeting will be arranged to clarify the technical scope of work, technical criteria, and commercial process and will not be compulsory
2 17 Clarification on enquiry documents	The tenderer will notify the <i>Employer</i> of any clarifications required before the closing time for clarification queries, which is <b>five (5)</b> working days before the deadline for tender submission
2 23 Alternative tenders	Alternative tenders are <b>not allowed</b>
2 25 Conditions of contract	The conditions of contract will be the <b>Term service contract</b>
2 31 Provision of security for performance	<p>If security for performance (e.g., Performance Bond) is required, the names of two financial institutions that the tenderer will approach must be submitted with the tender</p> <p>The following bonds are required for this enquiry - <b>not applicable</b></p>
3 4 Opening of tenders	<p>Tenders will be opened at the same date and time as the tender deadline</p> <p><b>01 November 2022 at 10:00 am</b></p>

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3 5 Prices to be read out	Prices <b>will not be read out</b>
3 9 Basic Compliance	<p>Basic compliance for this invitation to tender are</p> <ul style="list-style-type: none"> <li>• Meet the eligibility criteria for a tenderer</li> <li>• Submit one (1) hard copy of the original tender to Eskom</li> <li>• Submit a complete original tender with commercial, financial, and technical information</li> <li>• Submission of the mandatory commercial tender returnables as at stipulated deadlines</li> <li>• Central Supplier Database (CSD) number (MAA. )</li> </ul>
3 10 Mandatory tender returnable	<p><b><u>Technical</u></b></p> <p>Tenderers will be required to meet <b>70% functionality qualifying score</b> in order to be evaluated further and proposals that fail to achieve the minimum qualifying score for functionality will be disqualified</p> <p>1. Submit a Certified copy of SAQCC certificate for Fire Detection System</p> <p>A tenderer that does not submit mandatory documents/information in required in mandatory documents by the required deadlines as stipulated in the Tender Returnable section of the respective Invitation to Tender, will be deemed nonresponsive</p>
3 11 Pre-qualification criteria	Not applicable
3 12 Designated materials and thresholds	Designated material thresholds <b>are not applicable</b>
3 13 Functionality requirements	<p>Functionality requirements <b>are applicable</b></p> <p><b>Please refer to the attached Scope of Work and the Technical Evaluation Criterion embedded in the Invitation to Tender</b></p>
3 15 Evaluation of price	<p>Prices will be evaluated as follows</p> <ul style="list-style-type: none"> <li>• Inclusive of VAT</li> <li>• Making the specified correction for arithmetical errors</li> </ul>

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	<ul style="list-style-type: none"> <li>Excluding contingencies in any bill of quantities or activity schedule</li> <li>Making an appropriate adjustment for any other acceptable variations, deviations, or alternative tenders submitted</li> <li>Making a comparison of the Net Present Value of each adjusted tender based on the tendered programme (if provided) and prices, on the estimated effect of Price Adjustment Factors and rate of exchange fluctuations (if applicable) and on other evaluation parameters relating to uncertainty and risk, where applicable</li> <li>Unconditional discounts must be taken into account for evaluation purposes</li> <li>Conditional discounts must not be taken into account for evaluation purposes but should be implemented when payment is affected</li> </ul> <p>Prices will be scored out of 80 points</p>
3 17 Evaluation of B-BBEE	<p>B-BBEE status will be scored out of 20 points in accordance with PPPFA</p> <p>If a tenderer fails to submit proof of B-BBEE status level, the tenderer will not be disqualified (except if B-BBEE level is a pre-qualification criterion) The tenderer will, however, be awarded 80 points for price and will score 0 points for B-BBEE level /status (out of 20)</p>
3 18 Ranking of tenders	<p>Suppliers will be ranked by applying the preferential point scoring based on the relevant system as stipulated hereunder] -</p> <ul style="list-style-type: none"> <li>80/20 (for estimated values below R50M inclusive of VAT)</li> </ul> <p>Eskom will then add the score from Pricing and the B-BBEE level together and rank the suppliers from the highest to the lowest</p>
3 19 Objective Criteria (if applicable)	Objective criteria <b>are not applicable</b>
Contractual Requirements (if applicable)	<p>Contractual Requirements <b>are applicable</b> and may include</p> <ul style="list-style-type: none"> <li>SHEQ requirements</li> </ul>
Please Note:	

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Contractual requirements are not evaluation criteria. They are required to be met and assessed after the evaluation and ranking of the tenders. Proof that the highest ranked tenderer is able to meet the contractual requirements, must be submitted prior to contract award.

Failure to meet "Contractual Requirements" by the stipulated deadlines, may result in the tenderer being regarded as non-responsive and ineligible for contract award.

In the event that there are further documents/actions that are required during execution of the contract, these must be made contractual conditions and compliance thereto must be managed in terms of the contract.

CIDB Requirements (where applicable for Engineering and Construction Works Contracts)	CIDB Requirements <b>is not applicable</b>
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**Please note:**

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


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


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

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				<b>PART A: MANDATORY TECHNICAL REQUIREMENTS</b>	
<b>MATLA POWER STATION: COOLING WATER PRE-TREATMENT CHEMICALS</b>					
	Yes	No	Required (Mandatory) - PLEASE ATTACH THE FOLLOWING:		
The coagulant and flocculant should be a blended product and should be in the liquid form			Plant configuration		
<b>NOTE: NON CONFORMANCE TO ANYONE OF THE ABOVE REQUIREMENTS DISQUALIFY THE RESPECTIVE CONTRACTOR. ALL BLOCKS MUST BE TICKED YES IN ORDER TO PROCEED TO PART B. IF PROOF NOT ATTACHED AS REQUIRED ON COLUMN J, THE CONTRACTOR WILL BE SCORED "NO"</b>					

## EVALUATION CRITERIA

### Basic Compliance

- Review tender submission for compliance to all submission requirements (Tender Returnable)

### Step 1 Functionality


Technical / Engineering: 100%

A weighted score-card approach is used to evaluate the technical compliance of the tenders against the specifications. Tenders need to have a weighted score of 70% or more to technically qualify for further evaluation.

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PART B TECHNICAL EVALUATION CRITERIA SUPPLY AND DELIVERY OF COOLING WATER PRE-TREATMENT CHEMICALS									
<p>* First stage Evaluation Tender documents and Jar Test Results Proposals will be required to meet 55% qualifying score in order to be allowed to do Pre-contract trails (2nd stage) on the plant</p> <p>* Second Stage Evaluation Pre-contract Trail Proposals will be required to meet 15% qualifying score in order to be considered for total score evaluation</p> <p>* Total Score Evaluation Proposals will be required to meet a total combined score of 70% to be deemed technically suitable</p>									
	Sections	KPI - Criteria Evaluation Indicator	Source	%					Score
					0	2	4	5	
SECTION 1 TECHNICAL REQUIREMENTS									
Nr	Technical requirements				0%	40%	80%	100%	
Stage 1 Criteria	1	Technical Personnel Qualification - Diploma in Analytical Chemistry or Water Care and work experience in plants of similar design	SOW MEP-051316, Section 2 17	CV of the responsible person with related work experience on pre-treatment plants of similar design & copy of certificate for Diploma in Analytical Chemistry or Water care	20 %	< 2 years or work experience and/or the work experience mentioned is not of similar design	≥ 2 but < 4 years with related work experience on pre-treatment plants of similar design	≥ 4 but < 5 years with related work experience on pre-treatment plants of similar design	≥ 5 years with related work experience on pre-treatment plants of similar design
	2	Detailed previous jar test reports for previous work in	SOW MEP-051316, Section 2 16	Jar test reports with all 6 points mentioned as per SOW	20 %	0 references or references are mentioned but	1 - 2 references and most of the points mentioned	3 - 4 references and most of the points mentioned	5 or more references in report and all 6 points

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	plants of similar design		Section 2 19		with no additional details	ed in each reference	ed in each reference	mentioned in each reference		
3	Detailed MSDS	SOW MEP-051316, Section 2 10 & 2 11	Detailed 16 points Material Safety Data Sheet (MSDS) with a South African contact number for each chemical The MSDS must state the main active ingredient and the concentration thereof	10 %	0 MSDS attached	MSDS's attached for both chemicals, but not detailed		Detailed MSDS's attached for both chemicals		
4	Jar test results as per Eskom RT&D report	SOW MEP-051316, Section 2 5 Eskom Chemistry and Microbiology Standard for Cooling Water 240-5586476 7 Section 3 5	Test results as mentioned in Eskom RT&D test report and supplier report	25 %	Turbidity > 15 NTU	Turbidity >10 but ≤ 15 NTU	Turbidity >10 but ≤ 15 NTU	Turbidity B A ≤ 5 NTU		
TOTAL SCORE FOR 1ST STAGE EVALUATION									must be ≥55%	

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										to commence to 2nd stage	
Stage 2 Criteria	5	Trial test results as per Eskom RT&D report	SOW MEP-051315, Section 2.6 Eskom Chemistry and Microbiology Standard for Cooling Water 240-5586476 7 Section 3.5	Trial test results as mentioned in the Eskom RT&D trial report and supplier report	25 %	Turbidity > 15 NTU	Turbidity > 10 but ≤ 15 NTU	Turbidity > 5 but ≤ 10 NTU	Turbidity B A ≤ 5 NTU		
	TOTAL SCORE FOR 2ND STAGE EVALUATION										
											must be ≥15% to allow for total score evaluation
	TOTAL SCORE FOR STAGE 1 AND STAGE 2 EVALUATION										must be ≥70% to be deemed technically suitable

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#### Step 4 - Price and Preference Analysis

- 80% Price
- 20% BBEE

#### Price Evaluation (80 points)

Adjudication Criteria	Points
Price Evaluation  $P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	80

Where

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

$P_t$  = Comparative price of tender under consideration

$P_{\min}$  = Comparative price of lowest acceptable tender

#### B-BBEE Evaluation (20 Points)

Tenderers are required to submit a valid B-BBEE Status Level Verification Certificates together with their tenders to substantiate the B-BBEE claims


Tenderers who do not submit B-BBEE Status Level Verification Certificate or non-compliant contributors to B-BBEE will not qualify for preference points, however will not be disqualified from the tender process. Such tenderer will score out of 80 points for price and 0 points out of 20 for B-BBEE

Points awarded to a tenderer for attaining the B-BBEE Status Level of contribution in accordance with the table below

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B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0


The points scored for price will be added to the points scored for B-BBEE Status Level of contribution to obtain the tenderer's points out of a 100

Confirm if any objective criteria will be applied to the tender in terms of the PPPFA. If so, specify the criteria that will be applied, and the evaluation methodology.	<ul style="list-style-type: none"> <li>• Safety Health and Environmental (Refer to the below requirements)</li> <li>• Quality (Refer to the below requirements)</li> <li>• SD and L (Refer to the below requirements)</li> </ul>
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#### **STEP 5 - Contractual Conditions (Non-weighted criterion)**

In terms of the PPPFA, the application of objective criteria may be a valid and justifiable reason why a tender is not awarded to the highest scoring / highest ranked supplier, after application of the 80 20 preference points system


Objective criteria will generally be applied after evaluation and are generally the criteria / conditions specifically linked to contract award (viz , legal compliance, adherence to contract terms and conditions. The requirements for the objective criteria do not form part of the above Part A and Part B, however, they will be required from the recommended tenderer/s to submit them before the contract award

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### Safety and Health requirements


SHEQ is an objective criteria which means that tenders will be given an opportunity to submit once, within seven working days the SHEQ documents which they would have missed or not submitted during the tender close out. Only those tenderers who submitted/responded within the specified time will be considered and those who did not respond will be rendered non-responsive. SHEQ will only evaluate the shortlisted suppliers who passed the mandatory requirements.

Signed Annexure B Acknowledgement Form
OHS Policy signed by the Tenderer's CEO or MD
OHS Budget Breakdown covering the scope of works
Health and safety plan
Baseline Risk Assessment
Past 3 years OHS Statistics (fatalities, LTI's and Legally Reportable Incidents) suffered by the tenderer (if none signed letterhead to this effect must be forwarded)
Past 3 years OHS Legal notices issued against the tenderer e.g. Department of labour (if none signed letterhead to this effect must be forwarded)
Tenderer's valid letter of good standing with compensation fund or licensed insurer
Medical fitness certificate x 1 or Medical surveillance programme for non-operational suppliers or supplier with no employees

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Quality requirements:


NB: The tenderer must complete and sign this form to acknowledge and accept Eskom Supplier Quality Requirements as per QM 58 Specification and ISO 9001 Standard.

SECTION A (TENDERER)	ENQUIRY/ CONTRACT No:																																																																	
	ENQUIRY/ CONTRACT DESCRIPTION	To perform maintenance activities for Fire detection system at Matla Power Station for a period of five (05) years																																																																
SECTION B (ESKOM)	CLAUSES OF 240- 105658000	<table border="1"> <thead> <tr> <th>CLAUSE DESCRIPTION</th> <th>INDICATE WITH AN (X)</th> </tr> </thead> <tbody> <tr> <td><b>CLAUSE 3</b></td> <td><b>PRE-CONTRACT AWARD QUALITY REQUIREMENTS</b></td> <td>X</td> </tr> <tr> <td rowspan="5"><b>CLAUSE 4</b></td> <td>(*Select Only Applicable Category). NB: Not more than one category must be selected. Also indicate whether site</td> <td></td> </tr> <tr> <td>Category 1 (refer to clause 4.1.1 of 240-105658000)</td> <td>-</td> </tr> <tr> <td>Category 2 (refer to clause 4.1.2 of 240-105658000)</td> <td>-</td> </tr> <tr> <td>Category 3 (refer to clause 4.1.3 of 240-105658000)</td> <td>-</td> </tr> <tr> <td>Category 4 (refer to clause 4.1.4 of 240-105658000)</td> <td>X</td> </tr> <tr> <td></td> <td>Supplier and Sub-supplier Site Assessment (refer to clause 4.2</td> <td>-</td> </tr> <tr> <td rowspan="3"><b>CLAUSE 5</b></td> <td><b>POST-CONTRACT AWARD</b></td> <td></td> </tr> <tr> <td>Contract Execution (refer to clause 5.1 of 240-105658000)</td> <td>X</td> </tr> <tr> <td>Supplier Quality Performance Monitoring Phase (refer to clause</td> <td>X</td> </tr> <tr> <td rowspan="6"><b>CLAUSE 6</b></td> <td><b>STANDARD CONDITIONS</b></td> <td></td> </tr> <tr> <td>Eskom Rights of Access (refer to clause 6.1 of 240-105658000)</td> <td>X</td> </tr> <tr> <td>Eskom Rights to Information (refer to clause 6.2 of 240-</td> <td>X</td> </tr> <tr> <td>Preservation and Storage (refer to clause 6.3 of 240-</td> <td>X</td> </tr> <tr> <td>Supplier Quality Audits (refer to clause 6.4 of 240-105658000)</td> <td>X</td> </tr> <tr> <td>Nonconformities and Nonconforming Outputs Identified by Eskom</td> <td>X</td> </tr> <tr> <td></td> <td>Special Processes (refer to clause 6.6 of 240-105658000)</td> <td>X</td> </tr> <tr> <td>CLAUSES OF ISO 9001</td> <td> <table border="1"> <thead> <tr> <th>CLAUSE DESCRIPTION</th> <th>INDICATE WITH AN (X)</th> </tr> </thead> <tbody> <tr> <td><b>CLAUSE 4</b></td> <td>Context of the Organisation</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 5</b></td> <td>Leadership</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 6</b></td> <td>Planning</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 7</b></td> <td>Support</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 8</b></td> <td>Operation</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 9</b></td> <td>Performance Evaluations</td> <td>X</td> </tr> </tbody> </table> </td> </tr> </tbody></table>	CLAUSE DESCRIPTION	INDICATE WITH AN (X)	<b>CLAUSE 3</b>	<b>PRE-CONTRACT AWARD QUALITY REQUIREMENTS</b>	X	<b>CLAUSE 4</b>	(*Select Only Applicable Category). NB: Not more than one category must be selected. Also indicate whether site		Category 1 (refer to clause 4.1.1 of 240-105658000)	-	Category 2 (refer to clause 4.1.2 of 240-105658000)	-	Category 3 (refer to clause 4.1.3 of 240-105658000)	-	Category 4 (refer to clause 4.1.4 of 240-105658000)	X		Supplier and Sub-supplier Site Assessment (refer to clause 4.2	-	<b>CLAUSE 5</b>	<b>POST-CONTRACT AWARD</b>		Contract Execution (refer to clause 5.1 of 240-105658000)	X	Supplier Quality Performance Monitoring Phase (refer to clause	X	<b>CLAUSE 6</b>	<b>STANDARD CONDITIONS</b>		Eskom Rights of Access (refer to clause 6.1 of 240-105658000)	X	Eskom Rights to Information (refer to clause 6.2 of 240-	X	Preservation and Storage (refer to clause 6.3 of 240-	X	Supplier Quality Audits (refer to clause 6.4 of 240-105658000)	X	Nonconformities and Nonconforming Outputs Identified by Eskom	X		Special Processes (refer to clause 6.6 of 240-105658000)	X	CLAUSES OF ISO 9001	<table border="1"> <thead> <tr> <th>CLAUSE DESCRIPTION</th> <th>INDICATE WITH AN (X)</th> </tr> </thead> <tbody> <tr> <td><b>CLAUSE 4</b></td> <td>Context of the Organisation</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 5</b></td> <td>Leadership</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 6</b></td> <td>Planning</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 7</b></td> <td>Support</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 8</b></td> <td>Operation</td> <td>X</td> </tr> <tr> <td><b>CLAUSE 9</b></td> <td>Performance Evaluations</td> <td>X</td> </tr> </tbody> </table>	CLAUSE DESCRIPTION	INDICATE WITH AN (X)	<b>CLAUSE 4</b>	Context of the Organisation	X	<b>CLAUSE 5</b>	Leadership	X	<b>CLAUSE 6</b>	Planning	X	<b>CLAUSE 7</b>	Support	X	<b>CLAUSE 8</b>	Operation	X	<b>CLAUSE 9</b>	Performance Evaluations	X
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	CLAUSE 10	Improvement			X
SECTION	ESKOM'S QUALITY REPRESENTATIVE	NAME	DESIGNATION	DATE	SIGNATURE
SECTION	TENDERER'S QUALITY REPRESENTATIVE	NAME	DESIGNATION	DATE	SIGNATURE


NB: The tenderer must complete and sign this form to acknowledge and accept Eskom Supplier Quality Requirements as per QM 58 Specification and ISO 9001 Standard.

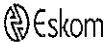
	<b>Supplier Quality Management: List of Tender Returnables Documents</b>		Unique Identifier	240-12248652	
			Revision	2	
			Effective Date	2018/10/26	
			Specification	QM 58	
Category 4: Quality Requirements		Deliverables to be evaluated indicator = 1		Weights	
<b>SECTION A : Quality Management System Requirements ISO 9001</b> <b>Objective evidence of documented QMS that is not certified but complies with ISO 9001</b>					
				Apply (Yes=1)	
A 1 Quality Method statement based on scope				1	40%
A 2 Quality Policy Approved by top management				1	
A 3 Quality Objectives Approved by top management.				1	
<b>Section A Score</b>				<b>3</b>	
<b>SECTION B : Evidence of QMS in operation (Tender Quality Requirements -Ref QM-58 /240-105658000)</b>					
				Apply (Yes=1)	
B 1 Documented information for defined roles, responsibilities and authorities				1	40%
B 2 Documented information for Control of Externally Provided Processes, Products and Services				1	
<b>Section B Score</b>				<b>2</b>	
<b>SECTION C. User defined additional Requirements &amp; miscellaneous (Ref QM-58)</b> <b>Customer specific requirements &amp; other standards and required can be listed and evaluated here</b>					
				Apply (Yes=1)	
C 1 Form A is completed and signed				1	20%
C 2 Add other requirements (if applicable) as per the scope of work and/ or specification				1	
<b>Section C Score</b>				<b>2</b>	

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<b>SECTION A : Quality Management System Requirements ISO 9001</b> <b>Objective evidence of documented QMS that is not certified but complies with ISO 9001</b>					40%
			Apply (Yes=1)		
A 1 Quality Method statement based on scope			1		
A 2 Quality Policy Approved by top management			1		
A 3 Quality Objectives Approved by top management			1		
Section A Score			3		
<b>SECTION B : Evidence of QMS in operation (Tender Quality Requirements -Ref QM-58 /240-105658000)</b>					
				Apply (Yes=1)	40%
B.1 Documented information for defined roles, responsibilities and authorities				1	
B 2 Documented information for Control of Externally Provided Processes, Products and Services				1	
Section B Score				2	
<b>SECTION C: User defined additional Requirements &amp; miscellaneous (Ref QM-58)</b> <b>Customer specific requirements &amp; other standards and required can be listed and evaluated here</b>					
				Apply (Yes=1)	20%
C 1 Form A is completed and signed				1	
C 2 Add other requirements (if applicable) as per the scope of work and/ or specification				1	
Section C Score				2	

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			Effective Date	2018/10/26	
			Specification	QM 58	
Category 1: Quality Requirements		Deliverables to be evaluated indicator = 1		Weights	
SECTION A : Quality Management System Requirements ISO 9001 Valid certification of Quality Management System by an ISO accredited body					
				Apply (Yes=1)	25%
A 1 Product / Service Scoping on ISO 9001 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	
Section A Score				4	
SECTION B : Evidence of QMS in operation (Tender Quality Requirements -Ref QM-58 /240-105658000)					
				Apply (Yes=1)	25%
B 1 Documented information for defined roles, responsibilities and authorities				1	
B 2 Documented information for Control of Externally Provided Processes, Products and Services				1	
B 3 Latest copy of an internal management system audit report (with Nonconformity, Correction and/ or Corrective Action Reports)				1	
B 4 Latest copy of an external management system audit report (with Nonconformity, Correction and/ or Corrective Action Reports)				1	
Section B Score				4	
SECTION C: Contract Quality Plan Requirements (Ref QM-58 and 240-109253698). Draft Contract Quality Plan specific to the scope of work as described in the tender documents (Ref ISO 10005)					
NB! Draft Contract/Project Quality Plan has important QA deliverables				Apply (Yes=1)	20%
Section C Score				1	
SECTION D: Quality Control Plan Requirements (Ref QM-58 or 240-109253302) QCP /Checklist/ ITP (Quality Control Plans) as per Scope of Works (Ref ISO 10005 & QM 58)					
NB! Example of an Inspection and Test Plan (ITP) or Quality Control Plan (QCP) on similar and/ or previous work done				Apply (Yes=1)	20%
				1	
Section D Score				1	
SECTION E : User defined additional Requirements & miscellaneous (Ref QM-58) Customer specific requirements & other standards and required can be listed and evaluated here					
				Apply (Yes=1)	10%
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	

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**Environmental requirements:**

Environmental Objective Criteria			
Category A: Contractors	Yes/No	Comments	
All contractors working for and on behalf of Matla Power Station on a once off (supply and delivery) or outage programs and with their activities which might not cause potential harm to the environment as per scope of work by environmental practitioner professional discretion Assessment for these contractors shall be done by completing the Environmental Contractor Assessment form, If there is any yes to the questionnaire then the Environmental Officer must be notified to conduct a proper assessment on the contract These suppliers or contractors must adhere or adopt the Contract Manager' Environmental Aspect and Impact register and the management thereof			
Completion of Environmental Contractors Assessment Form			
Sign Contractors commitment and indemnity letter			
OR ISO14001 certified with valid certificate			

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## SD& L requirements

### Section 1: Pre-qualification Criteria


Failure to meet Pre-qualification at tender stage will lead to disqualification					
<b>1.1 Minimum BBBEE status level of contributor?</b>  If Yes, what is the BBBEE status and/or level required	<table border="1"> <tr> <th>YES</th> <th>NO</th> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </table>	YES	NO	<input type="checkbox"/>	<input checked="" type="checkbox"/>
YES	NO				
<input type="checkbox"/>	<input checked="" type="checkbox"/>				
<b>1.2 Is there BBBEE category targeted for this enquiry?</b>  If Yes, BBBEE category	<table border="1"> <tr> <th>YES</th> <th>NO</th> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </table>	YES	NO	<input type="checkbox"/>	<input checked="" type="checkbox"/>
YES	NO				
<input type="checkbox"/>	<input checked="" type="checkbox"/>				
Tender Returnable if the above elements are requirements, <ul style="list-style-type: none"> <li>Valid original or certified copy of sworn affidavit in the case of EME's must be submitted (affidavit must be completed fully), or</li> <li>Valid Copy B-BBEE Certificate issued by CIPC for EME's OR</li> <li>Valid original or certified copy of the B-BBEE certificate / sworn affidavit in the case of QSE's must be submitted, or</li> <li>Valid original or certified copy of the B-BBEE certificate issued by SANAS Accredited Verification Agency for Generic Entities must be submitted, or</li> <li>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.</li> </ul>					
<b>1.3 Minimum subcontracting requirement for this?</b>  If Yes, what is the minimum percentage?	<table border="1"> <tr> <th>YES</th> <th>NO</th> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </table>	YES	NO	<input type="checkbox"/>	<input checked="" type="checkbox"/>
YES	NO				
<input type="checkbox"/>	<input checked="" type="checkbox"/>				
Tender Returnable if the above element is a requirement, <ul style="list-style-type: none"> <li>Letter of intent or any other <u>requested document</u> indicating commitment and the percentage required must be submitted as a tender returnable</li> <li>Sub-contracting can only be concluded with the following entities               <ul style="list-style-type: none"> <li>an EME or QSE which is at least 51% owned by black people,</li> <li>an EME or QSE which is at least 51% owned by black people who are youth,</li> <li>an EME or QSE which is at least 51% owned by black people who are women,</li> <li>an EME or QSE which is at least 51% owned by black people with disabilities,</li> <li>an EME or QSE which is 51% owned by black people living in rural or underdeveloped area or townships,</li> <li>a cooperative which is at least 51% owned by black people,</li> <li>a EME or QSE which is at least 51% owned by black people who are military veterans</li> </ul> </li> </ul>					

### Section 2: Mandatory Compliance for Contract Award

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**The following requirements are mandatory compliance for contract award and submissions can be clarified during evaluations or negotiated before contract is awarded**

#### 2.1 Local Content Designation

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

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

Please indicate below Designated Components

Commodity	Components	Local Content Threshold

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

#### 2.2 CIDB Skills Development

- a) Is there CIDB compulsory training?

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

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

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

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

**Mandatory Compliance for Contract Award continues.....**

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### 2.3 BBBEE Compliance

Is there minimum BBBEE level targeted?

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

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

### 2.4 Subcontracting Requirements

Is there a requirement for subcontracting?

If Yes, what is the targeted subcontracting percentage

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

**Scope that may be subcontracted and/or outsourced:**

### 2.5 Enterprise Development

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

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

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

Eskom's Target	Tenderer Proposal

### 2.6 Skills Development

Are there Skills Development targets?

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

If Yes, the contractors are required to propose skills development against Eskom's targets


Eskom's Target			
Category	Number	Entry Level	Output

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### Section 3: SDL&I Penalty and Performance Security

<p>Eskom will apply a penalty of 2.5% of the Contract Value for failure to meet SDL&amp;I obligations</p> <p><b>One of the following options will apply for SDL&amp;I performance security:</b></p> <ul style="list-style-type: none"> <li>▪ For the duration of the contract, Eskom will retain 2.5% of every invoice (excluding VAT) as security for the fulfilment of all SDL&amp;I Obligations. The retained amounts shall only be released to the Contractor upon fulfilment of all SDL&amp;I obligations at the end of the contract.</li> <li>▪ Alternatively the Contractor shall submit a bond equivalent to 2.5% of the Contract Value and shall only be released to the Contractor upon fulfilment of all SDL&amp;I Obligations.</li> <li>▪ Panels- Eskom will apply 2.5% retention on every invoice (excluding VAT) after all cumulative task orders awarded to the Contractor/Service Provider that have reached a stipulated threshold as security for the fulfilment of the SDL&amp;I obligations.</li> </ul>
---

### Section 4: Reporting and Monitoring

<ul style="list-style-type: none"> <li>• The suppliers shall on a monthly/quarterly basis submit a report to Eskom in accordance with Data Collection Template on their compliance with the SDL&amp;I obligations described above.</li> <li>• Eskom shall review the SDL&amp;I reports submitted by the suppliers within 60 (sixty) days of receipt of the reports and notify the suppliers in writing if their SDL&amp;I obligations have not been met.</li> <li>• Upon notification by Eskom that the suppliers have not met their SDL&amp;I obligations, the suppliers shall be required to implement corrective measures to meet those SDL&amp;I obligations before the commencement of the following report, failing which Retention clauses shall be invoked.</li> <li>• Every contract shall be accompanied by the SDL&amp;I Implementation Schedule which must be completed by the suppliers and returned to SDL&amp;I representative for acceptance 30 days after contract award.</li> </ul>
---


### Section 5: Market Research

<p>The following information demonstrates market analysis and assisted in arriving at BBBEE targets above:</p>	
<p><u>Current Suppliers Providing the Services</u></p> <p>N/A</p>	<p><u>Potential Suppliers</u></p>
<p>The following information demonstrates market analysis and assisted in arriving at Subcontracting targets above:</p>	
<p><u>Potential Subcontractors</u></p> <p>N/A</p>	

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## Section 7: General Information on Validity of Sworn Affidavits

The following must be considered when it comes to validity of Affidavits:
<p><b>Tenderers submitting B-BBEE Sworn Affidavits must ensure that the affidavits meet the following key pointers to ensure their validity:</b></p> <ul style="list-style-type: none"> <li>Name/s of deponent as they appear in the identity document and the identity number.</li> <li>Designation of the deponent as the <b>director, owner or member</b> must be indicated in order to know that person is duly authorised to depose of an affidavit <b>(Mark the applicable option)</b>.</li> <li>Name of enterprise as per enterprise registration documents issued by the CIPC, where applicable, and enterprise business address</li> <li>Percentage of black ownership, black female ownership and designated group In the case of specialised enterprises as per Statement 004, the percentage of black beneficiaries must be reflected <b>(No blank spaces to be left)</b></li> <li>Indicate total revenue for the year under review and whether it is based on <b>audited financial statements or management account (Mark the applicable option)</b>.</li> <li>Financial year end as per the <b>enterprise's registration documents</b>, which was used to determine the total revenue. <b>(Financial year end to be stipulated by day/month/year)</b>.</li> <li>B-BBEE Status level. An enterprise can only have one status level. <b>(Tick applicable level)</b></li> <li>Empowering supplier status must be indicated For QSEs, the deponent must select the basis for the empowering supplier status.</li> <li>Date deponent signed and date of Commissioner of Oath must be the same <b>(The sworn affidavit must be signed in the presence of the Commissioner of Oath. Furthermore the Commissioner must also sign and stamp)</b></li> <li>Commissioner of Oath cannot be an employee or ex officio of the enterprise because, a person cannot by law, commission a sworn affidavit in which they have an interest</li> </ul>

## Corporate Social Investment


Successful shall be expected to contribute 2% towards corporate social investment initiatives to benefit communities around Matla This item shall be negotiated with the successful bidder

Criteria	Expected CSI (%)	Target (%)	Proposal
CSI	2%	2%	

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### COMMERCIAL RETURNABLES


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

Reference	Returnables from supplier	Returnables mandatory for evaluation purposes and due at tender closing	Returnables mandatory for contract award and due prior to contract award closing
Basic Compliance	One (1) hard copy of the tender plus a copy of the original	✓	
<ul style="list-style-type: none"> <li>B-BBEE levels/EME/QSE</li> <li>Sub-contracting to designated groups</li> </ul> <p><b>Please Note that:</b> "proof of B-BBEE status level of contributor"</p>	"Proof of B-BBEE status level of contributor" for main contractor	✓ <b>BBBEE Compliance:</b>	
	CSD number	✓	
	Signed Sub-contracting intent agreement		✓
	"Proof of B-BBEE status level of contributor" for sub-contractor belonging to designated group	✓	
	Any other supporting documents to verify the status of the main contractor or sub-contractor (as may be stipulated in 3.11)	✓	
Annexure A	Acknowledgement Form	✓	
Annexure B	Tenderers Particulars	✓	
Annexure C	Integrity Pact Declaration form	✓	
Annexure D	CPA for local goods/services (if applicable)	✓	
Annexure E	CPA(IG) for imported goods/services (if applicable)	✓	
Annexure F1-F4	SBD 6.2 -Declaration certificate for local production and content and Annexures C, D,		✓

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	<b>E (only applicable where designated materials are included)</b>		
<b>Annexure G</b> (applicable for all suppliers including Foreign suppliers)	SBD 1- to be submitted with the tender at tender submission deadline		✓
<b>Annexure H</b>	SBD 6 1- Preference Points Claim Form in terms of PPPFA 2017 regulations		✓
Supplier Development & Localisation (SD&L) Undertaking (if applicable)			✓
<b>Additional Documents required in event of JV: -</b>	Letter of intent to form a JV/consortium	✓	
	Valid joint venture agreement confirming the rights and obligations of each of the joint venture partners and their profit-sharing ratios	✓	
	Written confirmation that the joint venture will operate as a single business entity (incorporated) for the duration of the contract (this may be included as an obligation within the JV agreement)	✓	
	<b>"Proof of B-BBEE status level of contributor"</b> 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 (as may be applicable for the particular tendering entity)	✓	
	Details and confirmation of a single designated bank account in the name of the JV and independent of the individual JV partners, as set out in the joint venture agreement		✓
<b>**"proof of B-BBEE status level of contributor" means: -</b>	Failure on the part of the supplier to submit <b>"proof of B-BBEE status level of contributor"</b> for purposes of evaluation and	✓	

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<b>(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;</b>	scoring by the tender closing will not result in disqualification (if tenderer is otherwise deemed to be responsive/acceptable in all other aspects and it is not a pre-qualification criterion) The tenderer will, however, be scored zero on B-BBEE for purposes of PPPFA scoring and ranking		
<b>Tax Clearance Certificates</b>	A certified copy of a tax clearance certificate is still required by Foreign suppliers (with a footprint in South Africa- but who are not on CSD and have not provided a SARS pin number) and Local suppliers (who have not provided their SARS e-filing PIN number for verification by Eskom and/or their CSD profile / CSD number) Foreign suppliers with no footprint in South Africa, must still complete the SBD1 document, however no proof of tax compliance is required	✓	
<b>Tax Evaluation Questionnaire (if services contract and was included as annexure)</b>	Evaluation questionnaire to determine whether a company, close corporation (CC) or Trust is a personal service provider for purposes of PAYE]		✓
<b>Compliance with Employment Equity Act</b>	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)		✓
<b>CIDB (where applicable)</b>	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	<b>N/A</b>	

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Shareholding	Shareholding organogram and detailed breakdown (for each individual company/JV member) clearly identifying percentages owned by individual shareholders (full names & ID Numbers) and other entities (provide full legal/trading name and respective identifying registration/trust numbers)	✓	
NEC/FIDIC Documentation	Completed NEC/FIDIC pricing schedule and contract data	✓	
<b>DOCUMENTS REQUIRED UNDER CONTRACT REQUIREMENTS</b>			
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	Documents that may be required per scope of work		✓
Other safety/quality documents as required per scope of works			✓
Environmental	Documents that may be required as per scope of work		✓
Due Diligence	Audited Financial Statements of the <i>tenderer</i> for the previous 18 months, or to the extent that such statements are not available, for the last year. Tenderers must note that in the case of a joint venture or special purpose vehicle (SPV) especially formed for this tender, audited financial statements for each participant in the JV / SPV is required. <i>Start-up enterprises formed within the last 12 months are not required to send in statements, but if successful with their tender will be required to send statements for the first year when once available</i>	N/A	

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## **ANNEXURE A**

### **ACKNOWLEDGEMENT FORM**

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

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

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

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

Or: Incorrect or incomplete for the following reasons. ☐

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **Cataloguing Acknowledgement:**

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


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

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

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

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

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

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

Contact details of contact person

Tel (landline) \_\_\_\_\_


Cell phone \_\_\_\_\_

e-mail address \_\_\_\_\_

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## **ANNEXURE B**

### **TENDERER'S PARTICULARS**

The *tenderer* must furnish the following particulars where applicable

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


Please complete the following

Name of lead partner/member in case of JV	
CIPC Registration Number (for each individual company / JV member)	
VAT registration number (for each individual company / JV member)	
CIDB registration number (for each individual company/JV member if applicable), respective contractor grading designation for each individual company/JV member, and combined cidb contractor grading designation (for JVs)	
Shareholding information (for each individual company/JV member) clearly identifying percentages owned by individual shareholders (full names & ID Numbers) and other entity shareholders (provide full legal/trading name and respective identifying registration/trust numbers)	Include as separate tender returnable if required
Contact person	
Telephone number	
E-mail address	

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Postal address (also of each member in the case of a JV)	
Physical address (also of each member of the JV)	

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


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

- 1 If you are currently registered as a vendor with Eskom, please provide your vendor registration number with Eskom \_\_\_\_\_
- 2 If you are currently registered as a vendor on the Treasury Central Supplier Database (CSD) please provide your supplier registration number with Treasury \_\_\_\_\_

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- 3 Please note that it is mandatory for you to register on National Treasury's CSD, if you intend doing work with any State department or State-owned entity/company
- 4 You may register online at National Treasury website on [www.treasury.gov.za](http://www.treasury.gov.za)
- 5 Alternatively, you may contact **Phasika Mpati 073 5878 667**.
- 6 If you are registered on SARS Efiling system, please provide your pin number in order to verify your tax compliant status\_\_\_\_\_
- 7 If you are required to be tax compliant as per SBD 1, but are not registered on CSD ( foreign suppliers) or have not provided your SARS Efiling pin, please confirm that you have attached/will send a copy of a current valid tax compliant certificate as a tender returnable (by contract award stage)

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

- 8 If sub-contracting is prescribed in the specific enquiry, you need to complete 8 1- 8 7

- 8.1 Confirm if you intend sub-contracting

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

- 8 2 What percentage will you be sub-contracting? \_\_\_\_\_%
- 8.3 To whom do you intend sub-contracting? \_\_\_\_\_
- 8 4 Is the said sub-contractor registered on CSD?

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

- 8 5 If yes to 8 4, please provide CSD number \_\_\_\_\_
- 8 6 Please confirm B-BBEE level of said sub-contractor \_\_\_\_\_
- 8 7 Which designated group does the sub-contractor belong to -
  - a Black people
  - b Black people who are youth
  - c Black people who are women
  - d Black people with disabilities
  - e Black people living in rural or underdeveloped areas or townships
  - f Cooperatives which are 51% owned by Black people
  - g Black people who are military veterans


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

- 8 8 Please confirm that you have attached your signed intent to sub-contract document

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

8 9 Have you attached proof of sub-contractor's belonging to designated group

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

**A. Single tenderers**

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

Signature \_\_\_\_\_

Designation \_\_\_\_\_

Date \_\_\_\_\_

**B. Joint Ventures**

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


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

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

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## ANNEXURE C

### INTEGRITY DECLARATION FORM

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

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


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

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

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- the *tenderer/s* and one or more of the *tenderers* in this tendering/RFP process have a controlling partner in common, or a relationship with each other, directly or through common third parties, that puts them in a position to have access to information about or influence on the tender/proposal of another tenderer, or influence the decisions of Eskom regarding this bidding process,

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

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


- If any employee/director/member/shareholder/owner of tenderer/s is also currently employed by Eskom, state whether this has been declared and whether there is authorisation(Y/N) to undertake remunerative work outside public sector employment and attach proof to this declaration  
\_\_\_\_\_
- Do the tenderer/s and other tenderer in this tendering/RFP process share a controlling partner or have any relationship with each other, directly or through common third parties? (Y/N) If yes, attach proof to this declaration \_\_\_\_\_

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## 2. DECLARATION OF FAIR TENDERING PRACTICES

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

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

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


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

Item	Question	Yes/No	No
1 1	<p>Is the <i>tenderer/s(or any of its directors/members/shareholders)</i> listed on National Treasury's Database of Restricted Suppliers as companies/persons prohibited from doing business with the public sector</p> <p><b><i>[Note: Companies/persons who are listed on the Database were informed in writing of this restriction by the Authority/Accounting Officer of the institution that imposed the restriction after the audi alteram partem rule was applied].</i></b></p> <p>The Database of Restricted Suppliers can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>).</p>		
1 2	<p>Is the <i>tenderer/s(or any of its directors / members / shareholders)</i>? listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combatting of Corrupt Activities Act (No 12 of 2004)</p>		

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	The Register for Tender Defaulters can be accessed on the National Treasury's website ( <a href="http://www.treasury.gov.za">www.treasury.gov.za</a> )		
1 3	Was the tenderer/s (or any of its directors/members/shareholders) convicted by a court of law (including a court outside South Africa) for fraud and/or corruption with respect to the procurement/tendering processes/procedures during the past five years?		
1 3 1	Provide details		
1 4	Was the tenderer/s (or any of its directors/members/shareholders) prohibited from doing business with any International Financial Development/funding Agency or Lending Institution		
1 5	Is there any history/record of the tenderer/s (or any of its directors/members/shareholders) failing to meet their contractual obligation with any SOC?		

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


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

Signature:	
Designation and capacity in which signing:	
Date:	

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### **Joint Ventures**

I, the undersigned, \_\_\_\_\_ hereby confirm that acting in the capacity of lead partner, I am duly authorised to sign all documents in connection with the tender and any contract resulting from it on behalf of

\_\_\_\_\_ (insert the full legal name of the JV )

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


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

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

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## **ANNEXURE D**

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

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

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

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

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

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

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

Tenderers shall comply with the following requirements

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

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

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

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


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

- A fixed priced offer in addition to the fully CPA compliant main offer, or

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- Any other offer with CPA specifications which deviate from the CPA requirements specified in the enquiry. However, it is compulsory that all such deviations are sufficiently substantiated.

Additional/Alternative Offers must be clearly indicated as such.

### 3. ESKOM'S PREFERRED INDEX LIST

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

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

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

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

### 5. NUMBER OF FORMULAE & INDICES

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

### 6. CPA FIXED PORTION

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


### 7. BASE DATE

- In instances of indices or other references published monthly, the Base Date is to be *The month before the month in which the Enquiry closes*.
- In instances where the reference figures, e.g., market prices, are published daily or at more intervals than once a month.

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*The average for the month before the month in which the Enquiry closes*

- In this case, the following shall apply
  - Where the average is published
 

*The average published price in the currency Eskom will be exposed to e.g. The currency in which Eskom will affect payment*
  - Where a high, low and mean are published
 

*The mean*
  - Where other prices than the Cash Settlement or Cash Sellers Price are published
 

*The Cash Settlement or Cash Sellers Price*
- Where applicable, these principles, must also apply for the CPA "cut-off" date

## 8. CPA FOR PROFESSIONAL SERVICES

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

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

No fixed portion is mandatory

Signed \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_ Position \_\_\_\_\_

Tenderer \_\_\_\_\_


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

Labour	Commodities	Processed material	Transport	Others
--------	-------------	--------------------	-----------	--------

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<b>Labour general (hourly paid)</b> SEIFSA, C3, actual labour cost	<b>Steel</b> StatsSA, P0142 1 Table 2, basic iron and steel	<b>Mechanical engineering material</b> SEIFSA, G, mechanical engineering material	SEIFSA, L2, road freight costs	StasSA, PO141 <b>CPI</b> (Headline) all items OR SEIFSA, D-2 (CPI)
	<b>Copper</b> SEIFSA, F, copper metric ton	<b>Electrical engineering material</b> SEIFSA, G-1, electrical engineering material		
<b>Labour general</b> SEIFSA, C3 (a), actual labour cost (field force) where subsistence allowance is paid	<b>Aluminium</b> SEIFSA, R, aluminium	<b>Building and construction material</b> SEIFSA, G, building and construction material		StasSA, PO142 1), <b>PPI</b> <ul style="list-style-type: none"><li>• Final Manufactured Goods</li><li>• Or Intermediate Manufactured Goods OR</li><li>• SEIFSA Table U Producer Price Index (PPI)</li></ul> - final manufactured GOODS OR Intermediate Manufactured Goods
	<b>Zinc</b> SEIFSA, F, zinc			
	<b>Lead</b> SEIFSA, F, lead			

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**Table 2: Preferred Foreign Index List**

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


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

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## **ANNEXURE E**

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

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

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

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

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

#### **PART 1: PAYMENT OF FOREIGN COMMITMENTS**

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

##### **Payment Method 1A:**

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

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

##### **Payment Method 1B**

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

Please note.


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

**Applicable (Y/N ) or**

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

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

Please note

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

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

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

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

#### **Fixed ZAR pricing**

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

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

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


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

## **PART 2: EXCHANGE RATES**

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

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

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

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

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


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

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

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

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

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

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

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

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

#### 4.2 EXPATRIATE LABOUR METHOD

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

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

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

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

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


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

1. When the percentage increase or decrease between two indices/prices/tariffs is calculated, the earlier figure shall be taken as the base.
2. Where portions of the works are delivered at different times, contract price adjustments shall be made in respect of appropriate portions of the contract price.
3. Where the terms of payment of the contract allow progress payments, other than Eskom's standard payment terms, the agreed contract price adjustment method shall be applied.

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to the value of such payment and to the date and level of completion to which payment is linked

- 4 Where any figure given in a table is therein stated to be a provisional figure or is subsequently amended, the figure as ultimately confirmed or amended in the publication concerned shall apply
- 5 Where the appropriate claim indices/prices, as defined in terms of the agreed formulae, are not available or are provisional, interim claims based on the last published confirmed or revised indices/prices as at the date of delivery/installation may be submitted When the confirmed or revised index/price becomes available the final claim may be submitted, provided that such claim is received within 180 days of the date of delivery/installation
- 6 Where requested by Eskom the contractor shall submit publications showing base indices/prices/rates as they become available as well as updated values at three monthly intervals during the course of the contract


Where it is considered, necessary Eskom reserves the right to call for any documentary evidence to substantiate claims

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

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## **ANNEXURE F1**

SBD 6 2

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

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

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


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

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

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

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.

1 6 A bid may be disqualified if this Declaration Certificate and the Annex C (Local Content Declaration Summary Schedule) are not submitted as part of the bid documentation

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

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

3 Does any portion of the goods or services offered have any imported content?  
(Tick applicable box)

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

3 1 If yes, the rate(s) of exchange to be used in this bid to calculate the local content as prescribed in paragraph 1 5 of the general conditions must be the rate(s) published by SARB for the specific currency at 12 00 on the date of advertisement of the bid


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

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

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Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

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


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

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

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

**IN RESPECT OF BID NO.**

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

NB

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


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

- (a) The facts contained herein are within my own personal knowledge
- (b) I have satisfied myself that
  - (i) the goods/services/works to be delivered in terms of the above-specified bid comply with the minimum local content requirements as specified in the bid, and as measured in terms of SATS 1286 2011, and

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- (c) The local content percentage (%) indicated below has been calculated using the formula given in clause 3 of SATS 1286 2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E which has been consolidated in Declaration C

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

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

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

- (d) I accept that the Procurement Authority / Institution has the right to request that the local content be verified in terms of the requirements of SATS 1286 2011
- (e) I understand that the awarding of the bid is dependent on the accuracy of the information furnished in this application. I also understand that the submission of incorrect data, or data that are not verifiable as described in SATS 1286 2011, may result in the Procurement Authority / Institution imposing any or all of the remedies as provided for in Regulation 14 of the Preferential Procurement Regulations, 2017 promulgated under the Preferential Policy Framework Act (PPPFA), 2000 (Act No 5 of 2000)

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

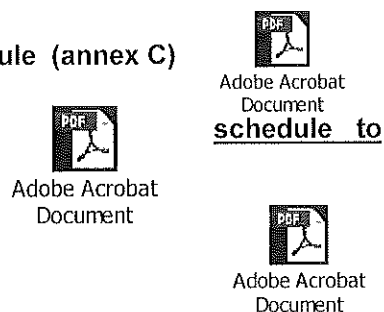
WITNESS No. 1 \_\_\_\_\_ DATE: \_\_\_\_\_

WITNESS No. 2 \_\_\_\_\_ DATE: \_\_\_\_\_

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

**Annexure F3 - \_Imports Declaration-Supporting Annex C(annex D)**


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



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## ANNEXURE G

SBD 1

### PART A INVITATION TO BID

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

BID NUMBER		CLOSING DATE		CLOSING TIME	
DESCRIPTION					

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


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

<b>SUPPLIER INFORMATION</b>					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
		TCS PIN		OR	CSD No
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]		<input type="checkbox"/> Yes		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes
		<input type="checkbox"/> No			
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?					

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AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)
	<input type="checkbox"/>	A REGISTERED AUDITOR NAME


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

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

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**PART B**  
**TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>
<p>1.1 BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-- (NOT TO BE RE-TYPED) OR ONLINE</p> <p>1.3. BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION, NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.</p> <p>1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION, NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS) MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.</p> <p>1.5 THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT</p>
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS</p> <p>2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA</p> <p>2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER</p> <p>2.6 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER</p>

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DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED

### 3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

- 31 IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐
- YES ☐ NO
- 32 DOES THE BIDDER HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO
- 33 DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA?  
☐ YES ☐ NO
- 34 DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA?  
☐ YES ☐ NO


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

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

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Annexure H

SBD 6.1

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

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

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

### 1. GENERAL CONDITIONS

- 1.1 The following preference point systems are applicable to all bids
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- 1.2
- a) The value of this bid is estimated to exceed/not exceed R50 000 000 (all applicable taxes included) and therefore the 90/10 preference point system shall be applicable, or
- 1.3 Points for this bid shall be awarded for
- (a) Price, and
  - (b) B-BBEE Status Level of Contributor
- 1.4 The maximum points for this bid are allocated as follows


	POINTS
<b>PRICE</b>	90
<b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>	10
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

- 1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE

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status level of contribution are not claimed

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

## 2. DEFINITIONS


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

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### 3. POINTS AWARDED FOR PRICE

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

A maximum of 90 points is allocated for price on the following basis  
**90/10**

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

Where

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

$P_t$  = Price of bid under consideration

$P_{\min}$  = Price of lowest acceptable bid

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

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

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


### 5. BID DECLARATION

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

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complete the following -

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

- 6 1 B-BBEE Status Level of Contributor 1 = (maximum of 10 points)  
 (Points claimed in respect of paragraph 7 1 must be in accordance with the table reflected in paragraph 4 1 and must be substantiated by relevant proof of B-BBEE status level of contributor)

**7. SUB-CONTRACTING**

- 7 1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

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

- 7 1 1 If yes, indicate

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

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

(Tick applicable box)

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


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

Designated Group: An EME or QSE which is at least 51% owned by:	EME	QSE
	√	√
Black people		
Black people who are youth		

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Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
<b>OR</b>		
Any EME		
Any QSE		

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


- 8 1 Name \_\_\_\_\_ of  
company/firm
- 8 2 VAT \_\_\_\_\_ registration  
number.. ... ..
- 8 3 Company \_\_\_\_\_ registration  
number. ... ..
- 8 4 TYPE OF COMPANY/ FIRM
- ☐ Partnership/Joint Venture / Consortium
  - ☐ One person business/sole propriety
  - ☐ Close corporation
  - ☐ Company
  - ☐ (Pty) Limited
- [TICK APPLICABLE BOX]

#### 8 5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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8 6 COMPANY CLASSIFICATION

- ☐ Manufacturer  
☐ Supplier  
☐ Professional service provider  
☐ Other service providers, e.g. transporter, etc

[TICK APPLICABLE BOX]

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


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

- i) The information furnished is true and correct,
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form,
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6 1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the bidding process
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation
  - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied, and
  - (e) forward the matter for criminal prosecution

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

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