

# THE HOUSING DEVELOPMENT AGENCY



## TERMS OF REFERENCE

**BID NO.: HDA/FS/2019/002**

**APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER  
(CONSULTING ENGINEER) FOR DEVELOPMENT OF  
INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR  
MATJHABENG LOCAL MUNICIPALITY**

**SUBMISSION DATE: 29 JULY 2019**

<b>TECHNICAL ENQUIRIES</b>	<b>BIDDING RELATED ENQUIRIES</b>
<b>HDA FREE STATE</b>  <b>Mr. Malik Kashe – Project Manager</b>  <b>THE HOUSING DEVELOPMENT AGENCY</b> FIRST FLOOR, SPITSKOP BUILDING NO. 86 KELLNER STREET <b>WESTDENE</b> <b>BLOEMFONTEIN</b> 9300  <b>Tel: (051) 409 0220</b>	<b>HDA HEAD OFFICE</b>  <b>Ms. Jane Mahlangu – SCM Office</b>  <b>THE HOUSING DEVELOPMENT AGENCY</b> BLOCK A, RIVIERA OFFICE PARK 6 – 10 RIVIERA ROAD <b>KILLARNEY</b> <b>JOHANNESBURG</b> 2193  <b>Tel: (011) 544 1000</b>

**NAME OF BIDDER (BIDDING ENTITY) :** \_\_\_\_\_

\_\_\_\_\_

**TELEPHONE NUMBER :** \_\_\_\_\_

**E-MAIL ADDRESS :** \_\_\_\_\_

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## VERY IMPORTANT NOTICE ON DISQUALIFICATION

A Bid not complying with the peremptory requirements stated hereunder and in the Bid document, will be regarded as being a not “**Acceptable Bid**” and as such will be rejected.

“**Acceptable Bid**” means any bid which, in all respects, complies with the conditions of Bid and specifications as set out in the bid document, including conditions as specified in the Preferential Procurement Policy Framework Act No. 5 of 2000, revised Preferential Procurement Regulations (2017 Regulations) and related legislations.

1. Submit bid in the correct bid box;
2. Submit bid before closing date and time;
3. Complete all Forms/Schedules in ink. Do not use pencils or correction fluid to make corrections;
4. Make corrections, if necessary, only by placing a line across the words/numbers to be corrected and initial next to the amended text. Do not scratch out, write over rates, paint over rates or use correction fluid;
5. Attach to the bid document proof of registration with ECSA as Professional Engineering Technologist (Electrical) or higher;

Furthermore, the bid will be considered as not acceptable if:

6. The bidder attempts to influence, or has in fact influenced the evaluation of the bid and/or the awarding of the contract;
7. The bidder during the last 5 years has failed to perform satisfactorily on a previous contract with any organ of state after written notice was given to that bidder that performance was unsatisfactory;
8. The bidder or any of his directors is listed on the Register of Bid Defaulters in terms of the Prevention and Combating of Corrupt Activities Act of 2004 as a person prohibited from doing business with the public sector.

Irrespective of the procurement process followed, no award may be given to a person:

9. who is in the service of the state, or;
10. if that person is not a natural person, of which any director, manager, principal shareholder or stakeholder is a person in the service of the state, or;
11. who is an advisor or consultant contracted with the HDA in respect of contract that would cause a conflict of interest.

HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

BID DOCUMENT

APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR  
DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG  
LOCAL MUNICIPALITY

THE BID

- PART T1 Bid Procedures
  - T1.1 Bid Notice and Invitation to Bid
  - T1.2 Bid Data
  
- PART T2 Returnable Documents
  - T2.1 List of Returnable Schedules and Forms
  
- PART C1 Agreements and Contract Data
  - C1.1 Form of Offer and Acceptance
  
- PART C2 Pricing Data
  - C2.1 Pricing Instructions
  - C2.2 Activity Schedule
  
- PART C3 Scope of Works

# **THE BID**

## **PART T1: BID PROCEDURES**

HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

BID DOCUMENT

APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR  
DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG  
LOCAL MUNICIPALITY

**PART T1      BID PROCEDURES**

T1.1   Bid Notice and Invitation to Bid

T1.2   Bid Data

## T1.1 BID NOTICE AND INVITATION TO BID

The Housing Development Agency (HDA) is a national public development agency that promotes the development of sustainable communities by making well-located land and buildings available for the development of housing and human settlements. For more information about the HDA, please visit our website [www.thehda.co.za](http://www.thehda.co.za).

The HDA hereby invites suitably qualified and reputable service providers to submit proposals for:

**CONTRACT NO: HDA/FS/2019/002**

### **APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY**

Compulsory Briefing Session will be held on the 11<sup>th</sup> July 2019 from 11:00 at the Matjhabeng Municipality's TS Du Plessis Hall, located at corner of Stateway and Tulbagh Streets in Welkom, Free State.

**NB: Failure to attend or late arrival (later than 11:00) at the Compulsory Briefing Session will result in automatic disqualification.**

The tender documents may be obtainable from HDA Website ([www.thehda.co.za/tenders](http://www.thehda.co.za/tenders)) or National Treasury E-portal (<http://etenders.treasury.gov.za/>) from Monday 01<sup>st</sup> July 2019. Completed bids, together with supporting documents must be placed in a bid box located at:

**The Housing Development Agency (HDA), First Floor, Spitskop Building, No. 86 Kellner Street, Westdene, Bloemfontein, 9300, not later than 11:00 on the 29<sup>th</sup> July 2019.** Telegraphic, telephonic, telex, facsimile, e-mail and late proposal submissions will not be accepted.

**PLEASE NOTE:** The HDA will not be responsible to oversee that proposals sent by courier are placed in the Bid /Tender box.

**The assessment and evaluation of submitted proposals will undergo a process of Pre-Qualification and Evaluation Phase. Pre-qualification will be in accordance with the 2017 PPPFA Regulations, which organs of state can apply in order to advance designated groups and transformation. Only tenderers who meet the Pre-qualification criteria stipulated in the tender document will be considered for the Evaluation Phase. A tenderer that fails to meet Pre-qualification criteria will be regarded as an unacceptable tender.**

**Pre-qualification criterion which a tenderer must meet in order to be considered:**

- having a Level 1 – 3 status as a minimum B-BBEE Status Level of Contributor.

Technical queries relating to the tender may be addressed to Malik Kashe on [malik.kashe@thehda.co.za](mailto:malik.kashe@thehda.co.za) or Tel: 051 409 0220 while SCM queries may be addressed to Jane Mahlangu on 011 544 1000 or [Jane.Mahlangu@thehda.co.za](mailto:Jane.Mahlangu@thehda.co.za)

The HDA reserves the right to accept or reject any variation, deviation, tender offer or alternative tender offer and may cancel the tender process and reject all tender offers at any time before the formation of a contract. The HDA will not incur any liability to a tenderer for such cancellation and rejection, but will give written reasons for such action upon request to do so.

## T1.2 BID DATA

The conditions of Bid are the Standard Conditions of Bid as contained in Annex F of the CIDB Standard for Uniformity in Construction Procurement (see [www.cidb.org.za](http://www.cidb.org.za)).

The Standard Conditions of Bid makes several references to the Bid Data for details that apply specifically to this Bid. The Bid Data shall have precedence in the interpretation of any ambiguity or inconsistency between it and the Standard Conditions of Bid. Each item of data provided below is cross-referenced to the clause in the Standard Conditions of Bid to which it mainly applies.

The additional Conditions of Bid are:

Clause Number	Bid Data
F1.1	The Employer is the Housing Development Agency
F1.2	Bid Documents

The Bid Document issued by the Employer comprises the following:

### THE BID

Part T1	: Bid Procedures
T1.1	: Bid Notice and Invitation to Bid
T1.2	: Bid Data
Part T2	: Returnable Documents
T2.1	: List of Returnable Schedules and Forms

### THE CONTRACT

Part C1	: Agreements and Contract Data
C1.1	: Form of Offer and Acceptance
Part C2	: Pricing Data
C2.1	: Pricing Instructions
C2.2	: Activity Schedule
Part C3	: Scope of Work

The Bid Document shall be obtained from the Employer at the physical address stated in the Bid Notice, upon payment of the amount stated in the Bid Notice.

The following documents are relevant to this bid and Bidders are advised to obtain their own copies thereof:

- (i) The Guideline for defining the scope of services and for determining The Professional Fees for Persons Registered in terms of the Engineering Profession Act, 2000 (Act No. 46 of 2000), as published annually by the Engineering Council of South Africa (ECSA) in the Government Gazette;
- (ii) Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and its 2017 Regulations.



F1.4 Communication and Employer's agent

Each communication between the Employer and a Bidder shall be to or from the Employer's agent only, and in a form that can be read, copied and recorded. Writing shall be in the English language. The Employer shall not take any responsibility for non-receipt of communications from or by a bidder.

The Employer's agent is:

**Name** : Mr. Malik Kashe  
**Address** : First Floor, Spitskop Building, No. 86 Kellner Street, Westdene, Bloemfontein, 9300  
**Tel.** : 051 409 0220  
**E-mail** : [malik.kashe@thehda.co.za](mailto:malik.kashe@thehda.co.za)

F2.1 Only those Bidders who have in their employ management and supervisory staff satisfying the requirements of the Scope of Work for supervisory and management staff are eligible to submit bids.

The Bidder will not be eligible to submit a bid if:

- (a) the Bidder is under restrictions or has principals who are under restriction to participate in the Employer's procurement due to corrupt or fraudulent practices;
- (b) the Bidder does not have the legal capacity to enter into the contract;
- (c) the Bidder submitting the bid is insolvent, in receivership, bankrupt or being wound up, has his affairs administered by a court or a judicial officer, has suspended his business activities, or is subject to legal proceedings in respect of the foregoing;
- (d) the Bidder does not have, in their full-time employment, suitably registered Professional Engineering Technologist (Electrical) registered in terms of the Engineering Profession Act, 2000 (Act No. 46 of 2000), with the relevant experience in the Electrical Engineering Projects.
- (e) the Bidder does not comply with the legal requirements stated in the Employer's procurement policy;
- (f) the Bidder cannot provide proof that he is in good standing with respect to duties, taxes, levies and contributions required in terms of legislation applicable to the work in the contract.

F2.7 The arrangements for a compulsory clarification meeting are as stated in the Bid Notice and Invitation to Bid.

Bidders must sign the attendance list in the name of the Bidding entity. Addenda will be issued to and bids will be received only from those bidding entities appearing on the attendance list.

F2.8 A clarification with the Employer regarding the Bid Document may be requested in writing at least five working days before the closing time stated in the Bid Notice and Invitation to Bid.

- F2.11 Do not make any alterations or additions to the Bid Document, except to comply with instructions issued by the Employer, or necessary to correct errors made by the bidder. All signatories to the Bid shall initial all such alterations. Erasures and the use of masking fluid are prohibited.
- F2.12 No alternative bids will be considered.
- F2.13.3 Parts of each Bid communicated on paper shall be submitted as original.
- F2.13.5 The Employer's address for delivery of Bid offers and identification details to be shown on each Bid offer package are:
- Location of Bid box** : Tender Box, Housing Development Agency, Bloemfontein
- Physical Address** : First Floor, Spitskop Building, No. 86 Kellner Street, Westdene, Bloemfontein, 9300
- Identification details** : Bid Number, title of Bid and the closing date and time of the Bid.
- Postal Address** : P.O. Box 3220, Bloemfontein, 9300
- F2.14 Bid which does not provide all the data or information requested completely and in the form required, may be regarded by the Employer as non-responsive.
- F2.15.1 The closing time for submission of Bids is as stated in the Bid Notice and Invitation to Bid.
- Telephonic, telegraphic, telex, facsimile or e-mailed Bid offers will not be accepted.
- F3.4 Bids will be opened immediately after the closing time for bids at the Housing Development Agency Office in Bloemfontein.

### **F3.11 EVALUATION OF BIDS**

The bids will be evaluated in three (3) stages, namely:

- Stage 1: Pre-qualification
- Stage 2: Functionality
- Stage 3: Financial Offer and Preference Evaluation

## STAGE 1: PRE-QUALIFICATION

Failure of the Bidder to submit the following will result in immediate disqualification:

- (i) Submission of proof of a bidder having a Level 1 – 3 Status as a minimum B-BBEE Status Level of Contributor. A Joint proof of B-BBEE Status Level of Contributor must be submitted for Joint Venture or Partnerships;
- (ii) Joint Venture Agreement and Power of attorney in case of Joint Ventures;
- (iii) Copy of valid Professional Indemnity Certificate;
- (iv) Proof of Registration with Engineering Council of South Africa (ECSA) as a Professional Engineering Technologist (Electrical) or higher.

## STAGE 2: FUNCTIONALITY

Functionality of responsive bids submitted will be evaluated according to the predetermined criteria described below, considering, among other factors, the quality, reliability, the technical capacity and ability of a Bidder. A Bid will not be evaluated further if it fails to meet the minimum threshold of total 70 points out of maximum 100 points for functionality as prescribed in the following tables:

CATEGORY	FUNCTIONAL CRITERIA	POINTS ALLOCATION
i	Experience of the Bidder (Company)	40
ii	Key personnel qualifications	30
iii	Key personnel experience	30
<b>TOTAL POINTS</b>		<b>100</b>

### EXPERIENCE OF THE BIDDER (COMPANY) (40 POINTS)

The Bidder must submit proof of successfully completed similar and comparative projects, **i.e. Development of Electricity Master Plan**. Copies of Appointment Letter and Employer's Reference Letter must be attached for each completed project.

TARGETED GOALS	POINTS ALLOCATION
Bidder has submitted inadequate or no information to determine allocated points	0
Bidder has submitted proof of at least 1 successfully completed similar project	15
Bidder has submitted proof of at least 2 successfully completed similar projects	30
Bidder has submitted proof of at least 3 successfully completed similar projects	40

## KEY PERSONNEL QUALIFICATIONS (30 POINTS)

The Bidder must submit Proposed Team Structure, identifying **Project Engineer, Project Manager and Project Co-ordinator** as key personnel. Copies of CVs and certificates for each key personnel must be attached for determination of points to be allocated as per the table below:

KEY PERSONNEL	TARGETED GOALS	POINTS ALLOCATION
Project Engineer	Inadequate or no information submitted to determine points to be allocated or a CV of Project Engineer with no proof of registration (certificate from ECSA) as at least a Professional Engineering Technologist (Electrical) submitted	0
	A CV of Project Engineer with proof of registration (certificate from ECSA) as at least a Professional Engineering Technologist (Electrical) submitted	5
	A CV of Project Engineer with proof of registration (certificate from ECSA) as a Professional Engineer (Electrical) submitted	10
Project Manager	Inadequate or no information submitted to determine points to be allocated or a CV of Project Manager with no certificate of B. Tech or B. Degree in Electrical Engineering submitted	0
	A CV of Project Manager with certificate of B. Tech or B. Degree in Electrical Engineering submitted	5
	A CV of Project Manager with proof of registration (certificate from SACPCMP) as a Professional Construction Project Manager submitted	10
Project Co-ordinator	Inadequate or no information submitted to determine points to be allocated or a CV of Project Co-ordinator with no certificate of National Diploma in Electrical Engineering submitted	0
	A CV of Project Co-ordinator with N6 Certificate in Electrical Engineering submitted	5
	A CV of Project Co-ordinator with certificate of National Diploma in Electrical Engineering submitted	10

## KEY PERSONNEL EXPERIENCE (30 POINTS)

The Bidder must submit Proposed Team Structure, identifying **Project Engineer, Project Manager and Project Co-ordinator** as key personnel. Copies of CVs and certificates for each key personnel must be attached for determination of points to be allocated as per the table below:

KEY PERSONNEL	TARGETED GOALS	POINTS ALLOCATION
Project Engineer	Inadequate or no information submitted to determine points to be allocated or a CV of Project Engineer with less than 5 years of relevant Electrical Engineering experience submitted	0
	A CV of Project Engineer with 5 to 10 years of relevant Electrical Engineering experience submitted	5
	A CV of Project Engineer with more than 10 years of relevant Electrical Engineering experience submitted	10
Project Manager	Inadequate or no information submitted to determine points to be allocated or a CV of Project Manager with less than 5 years of relevant Electrical Engineering experience submitted	0
	A CV of Project Manager with 5 to 10 years of relevant Electrical Engineering experience submitted	5
	A CV of Project Manager with more than 10 years of relevant Electrical Engineering experience submitted	10
Project Co-ordinator	Inadequate or no information submitted to determine points to be allocated or a CV of Project Co-ordinator with less than 3 years of Electrical Engineering experience submitted	0
	A CV of Project Co-ordinator with 3 to 5 years of Electrical Engineering experience submitted	3
	A CV of Project Co-ordinator with more than 5 years of Electrical Engineering experience submitted	5

### STAGE 3: FINANCIAL OFFER AND PREFERENCE EVALUATION

All responsive bids that qualify by meeting the minimum thresholds for functionality are then evaluated on the basis of price and preference in accordance with the 2017 Regulations of the Preferential Procurement Policy Framework Act No. 5 of 2000. The points scored for functionality are not carried over or considered in the calculation of the Financial and Preference evaluation.

- (1) The following formula will be used to calculate the points out of 80 for price in respect of a tender value, inclusive of all applicable taxes:

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

Where

$P_s$  = Points scored for price of tender under consideration;  
 $P_t$  = Price of tender under consideration, and;  
 $P_{\min}$  = Price of lowest acceptable tender.

- (2) The following table must be used to calculate the score out of 20 for BBEE:

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

- (3) A tenderer must submit proof of its B-BBEE status level of contributor.
- (4) A tenderer failing to submit proof of B-BBEE status level of contributor or is a non-compliant contributor to B-BBEE may not be disqualified, but:
- (a) may only score points out of 80 for price, and;
  - (b) scores 0 points out of 20 for B-BBEE.
- (5) A tenderer may not be awarded points for B-BBEE status level of contributor if the tender documents indicate that the tenderer intends subcontracting more than 25% of the value of the contract to any other person not qualifying for at least the points that the tenderer qualifies for, unless the intended subcontractor is an EME that has the capability to execute the subcontract.
- (6) The points scored by a tenderer for B-BBEE in terms of sub-regulation (2) must be added to the points scored for price under sub-regulation (1).
- (7) The points scored must be rounded off to the nearest two decimal places.
- (8) Subject to sub-regulation (9) and regulation 11, the contract must be awarded to the tenderer scoring the highest points.

(9) (a) If the price offered by a tenderer scoring the highest points is not market related, the organ of state may not award the contract to that tenderer.

(b) The organs of state may

(i) negotiate a market-related price with the tenderer scoring the highest points or cancel the tender;

(ii) if the tenderer does not agree to a market-related price, negotiate a market-related price with the tenderer scoring the second highest points or cancel the tender;

(iii) if the tenderer scoring the second highest points does not agree to a market-related price, negotiate a market-related price with the tenderer scoring the third highest points or cancel the tender.

(c) If a market-related price is not agreed as envisaged in paragraph (b)(iii), the organ of state must cancel the tender.

## **THE BID**

### **PART T2 : RETURNABLE DOCUMENTS**



## HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

### BID DOCUMENT

#### APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY

## T2.1 LIST OF RETURNABLE SCHEDULES AND FORMS

The Bid Document must be submitted as a whole. All forms must be properly completed as required and the document shall not be taken apart or altered in any way whatsoever.

All forms must be duly completed in **black ink** as required.

The list of returnable documents, which consists of forms and schedules to be completed and company specific certificates and information pages to be attached, comprise the following:

- Schedule A : Certificate of Authority of Signatory
- Schedule B : Company Registration Details
- Schedule C : Invitation to Bid (SBD 1)
- Schedule D : Tax Clearance Certificate Requirements (SDB 2)
- Schedule E : Declaration of Interest (SBD4)
- Schedule F : Preference Points Claim Form in terms of Preferential Procurement Regulations, 2017 (SBD 6.1)
- Schedule G : Declaration of Bidder's past Supply Chain Management Practices (SBD 8)
- Schedule H : Certificate of Independent Bid Determination (SBD 9)
- Schedule I : Certificate of Registration with ECSA
- Schedule J : Functionality Evaluation
- Schedule K : BBB-EE Status Level Certification (For compliance with B-BBEE Act and not a disqualifying factor if not submitted)

**SCHEDULE A: CERTIFICATE OF AUTHORITY FOR SIGNATORY**

Indicate the status of the Bidder by ticking the appropriate box hereunder. The Bidder must complete the certificate set out below for the relevant category.

(I) COMPANY	(II) CLOSE CORPORATION	(III) JOINT VENTURE	(IV) PARTNERSHIP	(V) SOLE PROPRIETOR

**Signatories for Companies, Close Corporations, Partnerships, Joint Ventures or Sole Proprietors must establish their authority thereto by attaching a copy of the relevant resolution of their Board of Directors, Members or Partners duly signed and dated.**

**(I) CERTIFICATE FOR COMPANY**

I, \_\_\_\_\_ chairperson of the Board of  
 Directors of \_\_\_\_\_,  
 hereby confirm that by resolution of the Board (copy attached) taken on \_\_\_\_\_ 20\_\_\_\_,  
 Mr/Ms \_\_\_\_\_  
 acting in the capacity as \_\_\_\_\_,

is authorized to sign all documents in connection with the Bid No.: HDA/FS/2019/002, and any contract resulting from it, on behalf of the company.

Chairman : \_\_\_\_\_

Witness (1) : \_\_\_\_\_ Witness (2) : \_\_\_\_\_

**(II) CERTIFICATE FOR CLOSE CORPORATION**

We, the undersigned, being the key members in the business trading as

\_\_\_\_\_

hereby authorise Mr/Ms \_\_\_\_\_,

acting in the capacity of \_\_\_\_\_

to sign all documents in connection with the Bid No.: HDA/FS/2019/002, and any contract resulting from it, on our behalf.

NAME	ADDRESS	SIGNATURE	DATE

**Note: This certificate is to be completed and signed by all key members upon whom rests the directions of the affairs of the Close Corporation as a whole.**

**(III) CERTIFICATE JOINT VENTURE**

We, the undersigned, are submitting this Bid in Joint Venture and hereby authorize

Mr/Ms \_\_\_\_\_,

authorized signatory of the Joint Venture \_\_\_\_\_

\_\_\_\_\_ ,  
acting in the capacity of lead partner, to sign all documents in connection with the

Bid No.: HDA/FS/2019/002 and any contract resulting from it, on our behalf. This authorization is evidenced by the attached power of attorney signed by legally authorized signatories of all the partners to the Joint Venture.

NAME OF FIRM	ADDRESS	DULY AUTHORISED SIGNATORY
		Name
		Signature
		Designation
		Name
		Signature
		Designation
		Name
		Signature
		Designation

**Note: This certificate is to be completed and signed by all of the key partners upon whom rests the direction of the affairs of the Partnership as a whole.**

**(IV) CERTIFICATE FOR PARTNERSHIP**

We, the undersigned, being the key partners in the business trading as \_\_\_\_\_  
\_\_\_\_\_ ,

hereby authorise Mr/Ms \_\_\_\_\_ ,

acting in the capacity of \_\_\_\_\_

to sign all documents in connection with the Bid No.: HDA/FS/2019/002 and any contract resulting from it, on our behalf.

NAME	ADDRESS	SIGNATURE	DATE

**Note: This certificate is to be completed and signed by all key members upon whom rests the direction of the affairs of Partnership as a whole.**

**(V) CERTIFICATE FOR SOLE PROPRIETOR**

I, \_\_\_\_\_ ,

hereby confirm that I am the sole owner of the business trading as \_\_\_\_\_  
\_\_\_\_\_

Signature of Sole Owner : \_\_\_\_\_

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

Witness (1) : \_\_\_\_\_

Witness (2) : \_\_\_\_\_

**SCHEDULE B: COMPANY REGISTRATION DETAILS**

The Bidder must provide Company Registration details on the space provided below and attach Certificates as proof of Registration.

NAME OF COMPANY : \_\_\_\_\_

\_\_\_\_\_

COMPANY REGISTRATION NUMBER : \_\_\_\_\_

NO. OF DIRECTORS/SHAREHOLDERS : \_\_\_\_\_

The space below must be used in the case of Joint Venture or partnership.

1. NAME OF COMPANY : \_\_\_\_\_

\_\_\_\_\_

CO. REGISTRATION NUMBER : \_\_\_\_\_

NO. DIRECTORS/SHAREHOLDERS : \_\_\_\_\_

2. NAME OF COMPANY : \_\_\_\_\_

\_\_\_\_\_

CO. REGISTRATION NUMBER : \_\_\_\_\_

NO. DIRECTORS/SHAREHOLDERS : \_\_\_\_\_

3. NAME OF COMPANY : \_\_\_\_\_

\_\_\_\_\_

CO. REGISTRATION NUMBER : \_\_\_\_\_

NO. DIRECTORS/SHAREHOLDERS : \_\_\_\_\_

4. NAME OF COMPANY : \_\_\_\_\_

\_\_\_\_\_

CO. REGISTRATION NUMBER : \_\_\_\_\_

NO. DIRECTORS/SHAREHOLDERS : \_\_\_\_\_

5. NAME OF COMPANY : \_\_\_\_\_

\_\_\_\_\_

CO. REGISTRATION NUMBER : \_\_\_\_\_

NO. DIRECTORS/SHAREHOLDERS : \_\_\_\_\_

**SCHEDULE C  
PART A  
INVITATION TO BID**

**SBD 1**

<b>YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (THE HOUSING DEVELOPMENT AGENCY (HDA))</b>				
<b>BID NUMBER:</b>	HDA/FS/2019/002	<b>CLOSING DATE:</b>	29 JULY 2019	<b>CLOSING TIME:</b> 11H00
<b>DESCRIPTION</b>	APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY			
<b>THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).</b>				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)				
<b>THE HOUSING DEVELOPMENT AGENCY (HDA), FIRST FLOOR, SPITSKOP BUILDING</b>				
<b>86 KELLNER STREET, WESTDENE, BLOEMFONTEIN</b>				
<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 <input type="checkbox"/> No		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	<input type="checkbox"/> Yes <input type="checkbox"/> No
IF YES, WHO WAS THE CERTIFICATE ISSUED BY?				
AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA) AND NAME THE APPLICABLE IN THE TICK BOX	<input type="checkbox"/>	AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION ACT (CCA)		
	<input type="checkbox"/>	A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN ACCREDITATION SYSTEM (SANAS)		
	<input type="checkbox"/>	A REGISTERED AUDITOR		
	NAME:			
<b>[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/SWORN AFFIDAVIT(FOR EMEs&amp; QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]</b>				
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 ]	
<b>SIGNATURE OF BIDDER</b>	.....	<b>DATE</b>		
<b>CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)</b>				
<b>TOTAL NUMBER OF ITEMS OFFERED</b>		<b>TOTAL BID PRICE (ALL INCLUSIVE)</b>		
<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:</b>		<b>TECHNICAL INFORMATION MAY BE DIRECTED TO:</b>		
DEPARTMENT/ PUBLIC ENTITY		CONTACT PERSON		
CONTACT PERSON		TELEPHONE NUMBER		
TELEPHONE NUMBER		FACSIMILE NUMBER		
FACSIMILE NUMBER		E-MAIL ADDRESS		
E-MAIL ADDRESS				

**PART B  
TERMS AND CONDITIONS FOR BIDDING**

<b>1. BID SUBMISSION:</b>	
1.1.	BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION. THE BID BOX IS GENERALLY OPEN DURING OFFICE HOURS, MONDAY TO FRIDAY, FROM 08H00 TO 16H00.
1.2.	ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED) OR ONLINE
1.3.	BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.4.	WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MAY NOT BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.
1.5.	THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER LEGISLATION OR SPECIAL CONDITIONS OF CONTRACT.
<b>2. TAX COMPLIANCE REQUIREMENTS</b>	
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3	APPLICATION FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.
2.4	BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
2.5	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER.
2.6	WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
<b>3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS</b>	
3.1.	IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
3.4.	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.	

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



**SCHEDULE D: TAX CLEARANCE CERTIFICATE REQUIREMENTS**

It is a condition of bid that the taxes of the successful bidder **must** be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.

- 1 In order to meet these requirement bidders are required to complete in full form TCC 001 "Application for a Tax Clearance Certificate" and submit it to any SARS branch office nationally. The Tax Clearance Certificate Requirements are also applicable to foreign bidders / individuals who wish to submit bids.
- 2 SARS will then furnish the bidder with a Tax Clearance Certificate that will be valid for a period of 1 (one) year from the date of approval.
- 3 The original and valid Tax Clearance Certificate with Tax Compliance Status (SARS Pin) must be submitted together with the bid. Failure to submit the original and valid Tax Clearance Certificate will result in the invalidation of the bid. Certified copies of the Tax Clearance Certificate will not be acceptable.
- 4 In bids where Consortia / Joint Ventures / Sub-contractors are involved each party must submit a separate original and valid Tax Clearance Certificate.
- 5 Copies of the TCC 001 "Application for a Tax Clearance Certificate" form, are available from any SARS branch office nationally or on the website [www.sars.gov.za](http://www.sars.gov.za).
- 6 Applications for the Tax Clearance Certificates may also be made via eFiling. In order to use this provision, taxpayers will need to register with SARS as eFilers through the website [www.sars.gov.za](http://www.sars.gov.za).

Signature of Bidder: \_\_\_\_\_

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

**SCHEDULE E: DECLARATION OF INTEREST**

1. Any legal person, including persons employed by the state\*, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority and/or take an oath declaring his/her interest, where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

**2. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

- 2.1. Full Name of bidder or his or her representative: .....
- 2.2. Identity Number: .....
- 2.3. Position occupied in the Company (director, shareholder etc.): .....
- 2.4. Company Registration Number: .....
- 2.5. Tax Reference Number: .....
- 2.6. VAT Registration Number: .....

---

\* "State" means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / shareholder/ member: .....

Name of state institution to which the person is connected: .....

Position occupied in the state institution: .....

Any other particulars:

.....  
.....  
.....

2.8 Did you or your spouse, or any of the company's directors/ shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

.....  
.....  
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.9.1 If so, furnish particulars.

.....  
.....  
.....

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between the bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

2.10.1 If so, furnish particulars.

.....  
.....

2.11 Do you or any of the directors /shareholders/ members of the company have any interest in any other related companies whether or not they are bidding for this contract? **YES / NO**

2.11.1 If so, furnish particulars:

.....  
 .....  
 .....

**3. Full details of directors / trustees / members / shareholders.**

Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number / Persal Number

**4. DECLARATION**

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2.1 TO 2.11.1 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
 Signature

.....  
 Date

.....  
 Position

.....  
 Name of bidder

**SCHEDULE F: 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 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 The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable;

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:

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

1.5 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 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;

## 3. POINTS AWARDED FOR PRICE

### 3.1 THE 80/20 PREFERENCE POINT SYSTEMS

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

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

Where

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

$P_t$  = Price of tender under consideration, and;

$P_{\min}$  = Price of lowest acceptable tender.

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

**5. BID DECLARATION**

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

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

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

**7. SUB-CONTRACTING**

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

**(Tick applicable box)**

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

7.1.1 If yes, indicate

- i) What percentage of the contract will be subcontracted .....%
- ii) The name of the subcontractor .....
- iii) The B-BBEE status level of the subcontractor .....
- iv) Whether the sub-contractor is an EME or QSE

**(Tick applicable box)**

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

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

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

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

8.1 Name of Company/Firm: .....

8.2 VAT Registration Number: .....

8.3 Company Registration Number: .....

**8.4 TYPE OF COMPANY/ FIRM**

- Partnership/Joint Venture / Consortium
- One Person Business/Sole Propriety
- Close Corporation
- Company
- (Pty) Limited

[TICK APPLICABLE BOX]

**8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES**

.....

.....

.....

.....

**8.6 COMPANY CLASSIFICATION**

- Manufacturer
- Supplier
- Professional Service Provider
- Other Service Providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business: .....



8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

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

WITNESSES

1. ....  
 .....  
 SIGNATURE(S) OF BIDDERS(S)

2. ....  
 DATE .....

ADDRESS .....

.....

.....

## SCHEDULE G: DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

1. This Standard Bidding Document must form part of all bids invited.
2. It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
3. The bid of any bidder may be disregarded if that bidder, or any of its directors have-
  - a. abused the institution's supply chain management system;
  - b. committed fraud or any other improper conduct in relation to such system; or
  - c. failed to perform on any previous contract.
4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p><b>The Database of Restricted Suppliers now resides on the National Treasury's website(<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</b></p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p><b>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>) by clicking on its link at the bottom of the home page.</b></p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	<p>Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		

4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

**CERTIFICATION**

**I, THE UNDERSIGNED (FULL NAME) .....  
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE  
AND CORRECT.**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE  
TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.**

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of Bidder**

Js365bW

**SCHEDULE H: CERTIFICATE OF INDEPENDENT BID DETERMINATION**

1. This Standard Bidding Document (SBD) must form part of all bids<sup>1</sup> invited.
2. Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging)<sup>2</sup>. Collusive bidding is a pe se prohibition meaning that it cannot be justified under any grounds.
3. Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
  - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
  - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
4. This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging. 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

---

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

<sup>2</sup> Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

**CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

\_\_\_\_\_  
(Bid Number and Description)

in response to the invitation for the bid made by:

\_\_\_\_\_  
(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: \_\_\_\_\_ that:  
(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
  - (a) has been requested to submit a bid in response to this bid invitation;
  - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience, and;
  - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>3</sup> will not be construed as collusive bidding.

<sup>3</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
- (a) prices;
  - (b) geographical area where product or service will be rendered (market allocation);
  - (c) methods, factors or formulas used to calculate prices;
  - (d) the intention or decision to submit or not to submit, a bid;
  - (e) the submission of a bid which does not meet the specifications and conditions of the bid, or;
  - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....  
**Signature**

.....  
**Date**

.....  
**Position**

.....  
**Name of Bidder**

**Js914w 2**

**SCHEDULE I: CERTIFICATE OF REGISTRATION WITH ECSA**

The Bidder shall attach hereto the Proof of Professional Registration of an individual registered with Engineering Council of South Africa (ECSA) in terms of Engineering Profession Act No. 46 of 2000 as a Professional Engineering Technologist (Electrical) or higher.

NAME OF REGISTERED PERSON : \_\_\_\_\_

\_\_\_\_\_

ECSA REGISTRATION NUMBER : \_\_\_\_\_

ECSA REGISTRATION CATEGORY : \_\_\_\_\_

POSITION IN THE COMPANY : \_\_\_\_\_

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_  
(Authorised Person)

**SCHEDULE J: FUNCTIONALITY EVALUATION RELATED EXPERIENCE OF BIDDER**  
**(NB: This schedule is used in evaluating Functionality)**

The Bidder shall list below or in a separate schedule a statement of those works/services of similar nature (Development of Electricity Masterplan) which they have satisfactorily completed in the past five years. Information must be provided in the format provided below. It is essential that telephone contact details of references be supplied.

**Please Note** : Copies of Appointment Letter and the Employer's Reference Letter for each Project must also be attached as proof.

PROJECT NAME	PROJECT VALUE	COMPLETION DATE	CONTACT PERSON

**NB:** Please attach separate page if space provided is not sufficient

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_  
 (Authorised Person)



**KEY PERSONNEL QUALIFICATION AND EXPERIENCE**  
**(NB: This schedule is used in Evaluating Functionality)**

The Bidder shall attach hereto a shortened CV (with copies of required certificates) for each key personnel available to work on the project in the Categories of Project Engineer, Project Manager and Project Co-ordinator.

The Bidder shall list below the key personnel to be used on this project.

NAME	POSITION	QUALIFICATIONS	YEARS OF EXPERIENCE
	PROJECT ENGINEER		
	PROJECT MANAGER		
	PROJECT CO-ORDINATOR		

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_  
(Authorised Person)

## **SCHEDULE K – BROAD-BASED BLACK ECONOMIC EMPOWERMENT (BBBEE) STATUS LEVEL CERTIFICATION**

Please note that failure to submit the B-BBEE Status Level Certificates will not be a disqualifying factor for any bid to be appointed in the Free State Database of Service Providers, and no points will be claimed for any Status Level at this stage, but the bidder must demonstrate compliance with the Broad-Based Black Economic Empowerment Act No. 53 of 2003, and applicable amendments and regulations, by attaching hereto the B-BBEE Status Level Certificate of the Bidding Company and/or Joint Venture Partners.

Only B-BBEE status level certificates issued by the following are valid:

- Verification Agencies accredited by the South African National Accreditation System (SANAS), or;
- Registered Auditors approved by the Independent Regulatory Board of Auditors (IRBA) in accordance with the approval granted by the Department of Trade and Industry.

Please note that a Joint B-BBEE Status Level Certificate, issued by the above-mentioned institutions, must be submitted for Joint Venture or Partnerships.

# **THE CONTRACT**

## **PART C1: AGREEMENTS AND CONTRACT DATA**

HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

BID DOCUMENT

APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR  
DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG  
LOCAL MUNICIPALITY

PART C1 AGREEMENTS AND CONTRACT DATA

C1.1 Form of Offer and Acceptance

C1.2 Contract Data

HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

BID DOCUMENT

APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY

**C1.1 FORM OF OFFER AND ACCEPTANCE**

(AGREEMENT)

OFFER

The Client, identified in the Acceptance signature block, has solicited offers to enter into a contract for the procurement of Professional services for **DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY**.

The Bidder, identified in the Offer signature block below, has examined the documents listed in the Bid Data and addenda thereto as listed in the Bid Schedules, and by submitting this Offer has accepted the Conditions of Bid.

By the representative of the Bidder, deemed to be duly authorised, signing this part of this Form of Offer and Acceptance, the Bidder offers to perform all of the obligations and liabilities of the Service Provider under the Contract including compliance with all its terms and conditions according to their true intent and meaning for an amount to be determined in accordance with the Conditions of Contract identified in the Contract Data.

THE OFFERED TOTAL OF THE PRICES INCLUSIVE OF VALUE ADDED TAX IS

.....

..... Rands (in words);

R..... (in figures),

This Offer, or part thereof, may be accepted by the Client by signing the Acceptance part of this Form of Offer and Acceptance and returning one copy of this document to the Bidder before the end of the period of validity stated in the Bid Data, whereupon the Bidder becomes the party named as the Service Provider in the Conditions of Contract identified in the Contract Data.

It is expressly agreed that no other matter whether in writing, oral communication or implied during the period between the issue of the Bid documents and the receipt by the Bidder of a completed signed copy of this Agreement shall have any meaning or effect in the contract between the parties arising from this Agreement.

FOR THE BIDDER:

Name : .....

Capacity : .....

Name of Bidder : .....

Address : .....

: .....

Signature : .....

Date : .....

**Witness (1)**

Name : .....

Signature : .....

Date : .....

**Witness (2)**

Name : .....

Signature : .....

Date : .....

## ACCEPTANCE

By signing this part of this Form of Offer and Acceptance, the Client identified below accepts the Bidder's Offer for the procurement of Professional services for **DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY**. In consideration thereof, the Client shall pay the Service Provider the amount due in accordance with the Conditions of Contract identified in the Contract Data. Acceptance of the Bidder's Offer shall form an agreement, between the Client and the Bidder upon the terms and conditions contained in this Agreement and in the Contract that is the subject of this Agreement.

The terms of the contract are contained in

Part C1        Agreements and Contract Data, (which includes this Form of Offer and Acceptance)

Part C2        Pricing Data

Part C3        Scope of Work

Deviations from and amendments to the documents listed in the Bid Data and any addenda thereto as listed in the Bid Schedules as well as any changes to the terms of the bid offer agreed by the bidder and the client during the process of offer and acceptance, are contained in the Schedule of Deviations (if any) attached to and forming part of this agreement. No amendments to or deviations from said documents are valid unless contained in the Schedule of Deviations.

The Bidder shall within two weeks after receiving a completed copy of this Agreement, contact the Client's agent (whose details are given in the Contract Data) to arrange the delivery of any bonds, guarantees, proof of insurance and any other documentation to be provided in terms of the Conditions of Contract identified in the Contract Data. Failure to fulfil any of these obligations in accordance with those terms shall constitute a repudiation of this Agreement.

Notwithstanding anything contained herein, this Agreement comes into effect on the date when the Bidder receives one fully completed original copy of this document, including the Schedule of Deviations (if any). Unless the Bidder within five working days of the date of such receipt notifies the Client in writing of any reason why he cannot accept the contents of this Agreement, this Agreement shall constitute a binding contract between the parties.

It is expressly agreed that no other matter whether in writing, oral communication or implied during the period between the issue of the Bid documents and the receipt by the Bidder of a completed signed copy of this Agreement shall have any meaning or effect in the contract between the parties arising from this Agreement.

FOR THE CLIENT:

Name : .....

Capacity : .....

Name of Bidder : .....

Address : .....

: .....

Signature : .....

Date : .....

**Witness (1)**

Name : .....

Signature : .....

Date : .....

**Witness (2)**

Name : .....

Signature : .....

Date : .....



HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

BID DOCUMENT

APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY

**SCHEDULE OF DEVIATIONS AND ADDENDA TO BID DOCUMENTS**

The extent of deviations from the bid documents issued by the Client before the closing date is limited to those permitted in terms of the conditions of bid. A bidder covering letter (if any) shall not be included in the final contract document. Should any matter in such letter, which constitutes a deviation as aforesaid, become the subject of agreements reached during the process of offer and acceptance, the outcome of such agreement shall be recorded here. Any matter arising from the offer and acceptance either as a confirmation, clarification or change to the bid documents and which it is agreed in writing by the Parties becomes an obligation of the contract shall also be recorded and attached here. We confirm that the following written communication (if any) received from the Client before the submission of this Bid offer, has been taken into account in the Bid offer.

	Date	Title or Details
1		
2		
3		
4		
5		

Attach to the bid documents any written communication received from the Client (if any). Record such addenda in the above schedule.

Signed by the Bidder : .....

Date : .....

Name : .....

# **THE CONTRACT**

## **PART C2 : PRICING DATA**

HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

BID DOCUMENT

APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR  
DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG  
LOCAL MUNICIPALITY

PART C2 PRICING DATA

C2.1 Pricing Instructions

C2.2 Activity Schedule

## HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

### BID DOCUMENT

#### APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY

### **C2.1 PRICING INSTRUCTIONS**

The services to be provided, to a small extent, follow the Guideline Scope of Service and Tariff of Fees for Persons Registered in terms of the Engineering Profession Act published by the Engineering Council of South Africa in terms of the Engineering Profession Act. The Guidelines have been extensively amended by the Employer.

- The Bidder is to allocate a maximum lump sum bid to each item in the Activity Schedules.
- Activities must be completed to the satisfaction of the client and invoiced on completion of the activity.
- The bid and the total price for each activity may not be exceeded.
- The amounts inserted in the Activity Schedules are deemed to include for all expenses, costs, profit, general obligations etc., necessary to carry out the professional services described in the various documents.
- Amounts due to the Service Provider shall be paid by the client within thirty (30) days of receipt of correct or corrected relevant invoices.
- The Client does not guarantee that the projects will be completed in one continuous stage.
- The Client reserves the right, by giving written notice to the Bidder, to stop the progress of a particular project stage at any time. Should the Client exercise this right, the client will pay the Bidder for work done and expenses incurred only up to the time that the notice was given.
- The client reserves the right to change the total number of months given if it considers it to be unreasonable. Lump sum bid however shall not change.

HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

BID DOCUMENT

APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER)  
FOR DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR  
MATJHABENG LOCAL MUNICIPALITY

**C2.2 ACTIVITY SCHEDULE**

The activity schedules must be completed in full and all expected costs must be reflected including all costs, expenses and disbursements all as described in the pricing instructions. Please refer to the Scope of Works when completing the schedule.

<b>ITEM</b>	<b>DESCRIPTION</b>	<b>LUMP SUM RAND</b>
1	Status quo analysis	
2	Final Electricity Master Plan	
3	Operation & Maintenance Manual	
<b>Sub -Total</b>		
<b>Vat @ 15%</b>		
<b>GRAND TOTAL</b>		

NAME OF BIDDER : \_\_\_\_\_

AUTHORIZED SIGNATURE : \_\_\_\_\_

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

# **THE CONTRACT**

## **PART C3 : SCOPE OF WORKS**

## HOUSING DEVELOPMENT AGENCY

BID NUMBER: HDA/FS/2019/002

### BID DOCUMENT

#### APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER (CONSULTING ENGINEER) FOR DEVELOPMENT OF INFRASTRUCTURE MASTER PLAN (ELECTRICAL) FOR MATJHABENG LOCAL MUNICIPALITY

### **C3 SCOPE OF WORK**

The HDA has been appointed by the National Department of Human Settlements to assist with the Human Settlements component of the National Mining Towns Intervention. The objectives of the human settlements component of the intervention require the transformation of the mining towns through the creation of sustainable integrated human settlements. Currently, the intervention has focused on fast-tracking and supporting existing human settlement projects in the mining town areas. The human settlement planning and project pipeline development work requires accurate planning of the required infrastructure to ensure the necessary impact and transformation in the mining towns to ensure the creation of integrated sustainable human settlements.

In 2018, the HDA in consultation with Matjhabeng Local Municipality embarked on a programme to develop the infrastructure master plan for the municipality. The Master Plan is in 3 phases, which are done separately. The first phase is the water and sanitation (completed) and the second is the Energy Masterplan. The main focus of the Energy Master Plan is to consolidate and coordinate the planning actions of Matjhabeng LM. The purpose of the Master Plan is to present an acceptable electrical infrastructure development plan to the Municipality in order to assist with the implementation of projects that will ensure the improvement and sustainability of the current infrastructure. The Master Plan should be seen as a step in a continuous process of project identification and prioritisation, design, allocation of funding, and development of an electrical infrastructure asset management programme.

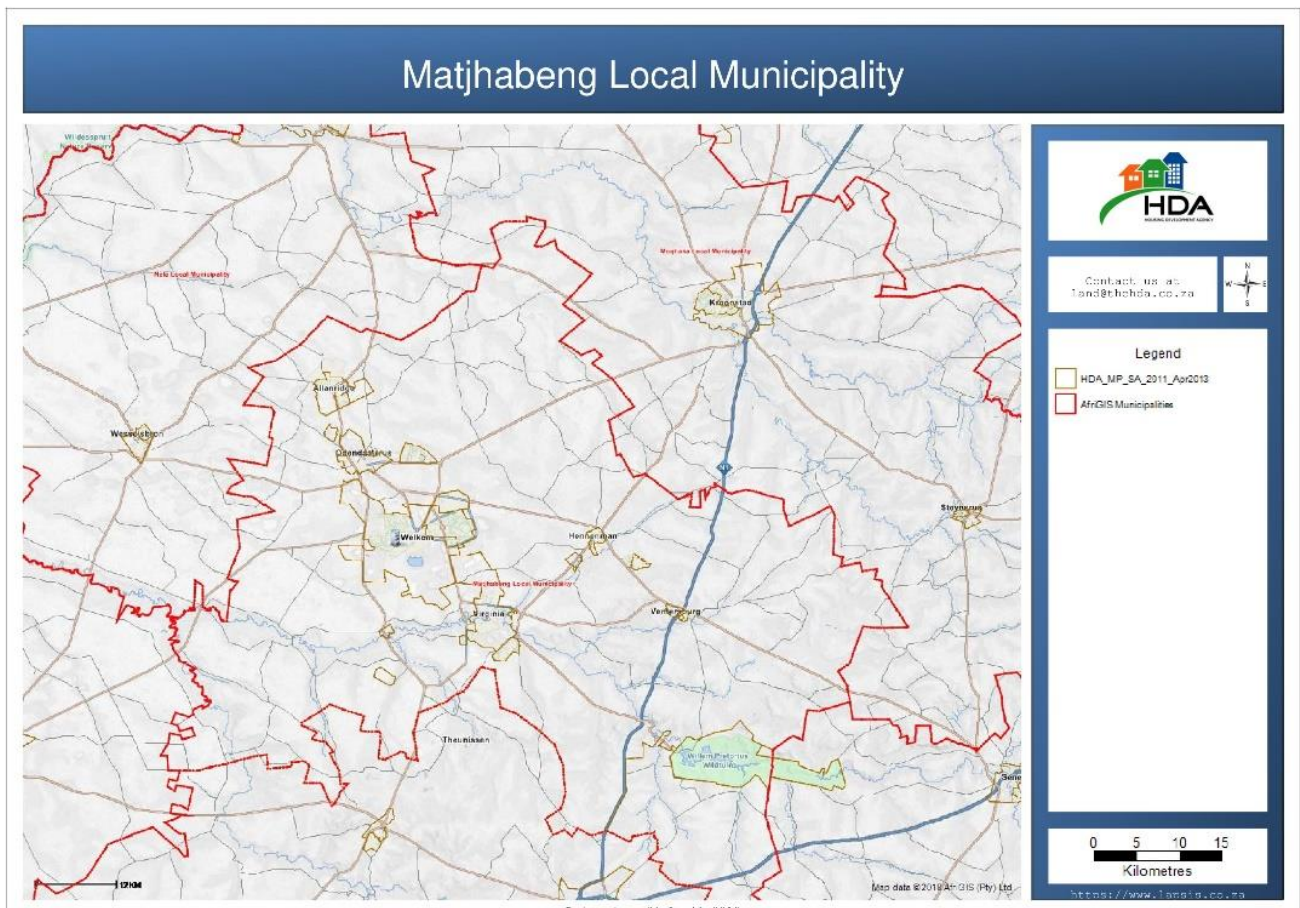
HDA intends to appoint a Professional Service Provider (Consulting Engineer) for development of 10-Year Infrastructure Master Plan (Electrical) for Matjhabeng Local Municipality. The following are the project deliverables, which will be used as Key Indicators of the project progress.

## PROJECT LOCATION

The study area is Matjhabeng Local Municipality. Matjhabeng Local Municipality is located in the north-west of the Lejweleputswa District in the Free State Province. The Municipality covers approximately 11190 km<sup>2</sup>. The study area is limited to that part of the municipality containing the following towns (and all their townships):

- Allanridge (including Nyakalong)
- Odendaalsrus (including Kutlwanong)
- Welkom (including Bronville and Thabong)
- Virginia (including Meloding)
- Hennenman (including Phomolong and Whites)
- Ventersburg (including Mmamahabane and Tswelangpele)

Welkom provides the highest order of social, economic and recreational facilities in the sub-region. It is located 65 km west of Kroonstad which is situated on the N1 national route between Bloemfontein and Johannesburg. In its immediate sub-region, Matjhabeng is surrounded by a number of gold mines. These mines form a major part of the spatial character of the region and contribute significantly to the economy of the area.





## **1. STATUS QUO ANALYSIS**

This involves the process of assessing the existing municipality electrification system by collecting and analysing the information that can be obtained from the municipality, Eskom and Department of Energy. The following should be used as a guiding tool that must be followed when compiling status quo analysis report.

### **1.1. DEFINE OR REVIEW STUDY AREA**

This process involves assessing the electric network covering all areas supplied with electricity by both the Municipality and Eskom within the municipality's area of jurisdiction. The deliverables of this stage include:

- geographical map showing location of study area(s);
- maps showing existing electrical networks, and;
- network single line diagram(s).

### **1.2. GATHER NETWORK AND LOAD INFORMATION**

In this stage, the service provider will be expected to collect information relating to network and load, and also categorising the municipal consumers in terms of different consumptions, e.g. businesses (including industries and mines), low income (i.e. indigents), middle income and high income earners. The deliverables of this stage are:

#### **1.2.1 Obtaining Load (Demand), Customer and Electrification Information**

This includes:

- obtaining network loading data (Statistical metering, Load profiles, Billing and SCADA data);
- identifying numbers and type of customers in the area;
- identifying bulk customers, electricity usage patterns in the area, and;
- obtaining Electrification Plans and usage data.

#### **1.2.2 Obtaining refurbishment Information**

This includes:

- obtaining all proposed refurbishment plans and needs;
- obtaining existing refurbishment reports, and;
- obtaining condition and age of networks.

#### **1.2.3 Obtaining Network Performance/Reliability Information reports and KPIs**

#### **1.2.4 Obtaining Quality of Supply Information reports and KPIs**

#### **1.2.5 Obtaining Operational Requirements**

This includes:

- obtaining any network contingency plans, and;
- Identifying any operational problems, network reliability and flexibility.

#### 1.2.6 Obtain Existing Network Planning Reports

This includes:

- obtaining transmission and sub-transmission planning reports, and;
- obtaining reticulation network reports.

#### 1.2.7 Obtaining existing Environmental Requirements

## **2. ENERGY MASTER PLAN**

The majority of work will be centred around the compilation of the Master Plan, which will assist the municipality in strategically planning for providing electric services to all the residents of Matjhabeng municipality. The plan will outline the prioritisation of required projects that will also support the municipality economic and sustainable growth. The following key indicators must be followed when developing the Master Plan.

### **2.1. COMPILE LOAD FORECAST**

The load forecast is a crucial input to the network strengthening study. During this task a load forecast needs to be developed that is based on regional demographic and historical load growth patterns. The anticipated long-term load forecast needs to be directly used as input to the long-term Matjhabeng expansion plan in terms of the Municipal Spatial Development Framework.

Using the existing information collected when compiling status quo analysis report, the service provider will be expected to compile the load forecast, which will assist the Municipality to plan better and prioritise its projects. The deliverables of this stage are:

- existing load forecasts (incl. Electrification Plans);
- customer base and load profile data;
- load forecast data from large customers;
- potential loads, spatial developments initiatives, etc.;
- future load demand trends;
- load duration curves;
- geographical load forecasts for the area, and;
- network load forecasts per substation and network

## **2.2. ANALYSE EXISTING NETWORK AND DEFINE PROBLEM STATEMENT**

The service provider must analyse the existing network (including sub stations) and define the problem statement which will guide the Municipality on how to address the challenges that may hamper provision of electrical services to the customers. The deliverables of this stage are:

### **2.2.1.Existing Network Capability**

This is achievable by:

- Performing load flow studies to identify voltage and thermal problems (using existing network, and present & future loads);
- Performing fault studies to identify excessive fault levels or equipment ratings being exceeded;
- Analysing refurbishment plans and age and condition of network equipment;
- Analysing network performance KPI's to identify poorly performing networks;
- Analysing QOS information to determine if limits are being exceeded;
- Analysing system reliability to determine if alternative infeeds, duplicate transformers, improved protection are required, and;
- Analysing networks to identify problems that require strengthening.

### **2.2.2.Immediate & Future Network Problems**

### **2.2.3.List of all network problems/needs that need further investigation**

## **2.3. IDENTIFY AND EVALUATE ALTERNATIVES**

The service provider must identify, investigate and evaluate alternatives that will improve the Municipality's ability to serve its customers with sustainable electric services. The deliverables of this stage are:

### **2.3.1.Demand Side Options (Load shifting, alternative tariffs, distributed generation, etc.);**

### **2.3.2.Supply Side Options**

This includes:

- Network re-configuration;
- Network strengthening (new substations and power lines);
- Improve protection (breaker placement, motorised isolators etc.);
- Network maintenance/refurbishment/replacement, and;
- New Transmission infeeds/strengthening.

### **2.3.3.Viable Alternatives evaluation**

### **2.3.4.Strengthening Options and Technical Evaluation**

The objective of this task needs to identify network-strengthening options and to perform technical evaluations to ensure that load and performance criteria are met in the Next 20 Years. Network analysis must be able to test compliance with the following minimum requirements:

- Thermal loading;
- Voltage standards, and;
- Contingency requirements.

## **2.4. CAPITAL PLAN AND FINANCIAL EVALUATION**

Once the viable options are properly evaluated and documented, a capital plan and financial evaluation must be conducted to develop a proper masterplan. This can be achieved by:

- Selecting preferred alternative(s) and compiling capital plan;
- Conducting a sensitivity analysis on preferred alternative (with regards to load forecast);
- Calculating Modified Internal Rate of Return (MIRR) and Net Present Value (NPV);
- Producing geographical map showing proposed future electrical network;
- Producing network single line diagram showing proposed future network, and;
- Preparing proposed time frame for implementation (including phasing-in of solutions).

The cost estimates must also be based on the requirements for:

- Expansion and Strengthening, and;
- Refurbishment projects.

## **2.5. COMPILE REPORT AND OBTAIN APPROVAL**

The following information needs to be secured and reviewed to ensure the compilation of a comprehensive Electrical Master Plan:

- Previous planning reports,
- Historical billing information for key customers: Key Customer information (KWh and KVA readings for 2019);
- Mini-substation information must be obtained and compiled on excel spreadsheet;
- Load data for distribution substations and feeders needs to be obtained;
- Historical Eskom supply information (three years);
- Land-use information needs to be obtained from GIS Global Image as well as TV3;
- All relevant role-players must be engaged in regards to new and future developments;
- Development initiatives need to be discussed with Town Planners;
- Municipal Spatial Development Framework (SDF);
- Existing network single line diagrams for the Municipality's HV / MV/ LV networks.

## Other Information

The following is a list of information that is deemed necessary to be sourced by the appointed service provider from other organizations that needs to be used to develop portions of the Geographical Load Forecast:

- Ortho photos (Obtained from the Department of Land Affairs);
- Cadastral information, and;
- Basic topological information.

All mapping and geographical presentation of information and data needs to be done using (this must be confirmed with the MLM):

- ESRI;
- ArcMap 9;
- Microstation CAD Ver8.0.

### 2.3.2 Network Analysis

The PTI power flow analysis program, PSS/Adept Rev 5.0 needs to be used throughout the analysis process (this must be confirmed with the MLM).

Compilation of the Master Plan is the final stage, where the final report must be compiled for perusal and approval by the Municipal Council. The following steps must be taken into consideration at this stage:

- Present findings to the Project Steering Committee (PSC), discuss problems and proposed solutions, obtain inputs from stakeholders, and, if necessary, modify recommendations.
- Compile final report and present it to the PSC for approval.
- Once approved by the PSC, the service provider may be requested to present the approved Master Plan to the Municipal Council for adoption.