



INDEPENDENT DEVELOPMENT TRUST

EXPRESSION OF INTEREST

**MULTI-DISCIPLINARY PROFESSIONAL SERVICES TO THE INDEPENDENT
DEVELOPMENT TRUST FOR STRATEGIC INFRASTRUCTURE MANAGEMENT
PROGRAMME FOR THE PERIOD OF THREE (3) YEARS WITH AN OPTION TO EXTEND
FOR FURTHER TWO (2) YEARS**

TENDER NO: IDT-MDPS-2024-2027

CLOSING DATE: MONDAY, 20 MAY 2024 @ 11:00

PREPARED BY:

INDEPENDENT DEVELOPMENT TRUST (IDT)

IDT KZN Office
04th Floor The Marine Building
22 Dorothy Nyembe Street
Durban (CBD)

BIDDER'S DETAILS	INFORMATION
Company Name	
Contact number	
Email address	
CSD number	
Company Physical address	

1. BACKGROUND

1.1 IDT AS AN ENTITY

The Independent Development Trust (*hereinafter referred to as IDT*) is a Schedule 2 Public Entity governed by applicable legislative frameworks and a Deed of Trust. The organization is accountable to Parliament through the Minister of Public Works who is the Executive Authority.

The mandate of the IDT is to support and add value to the developmental agenda of government as indicated in the mission statement; “The IDT manages and delivers Integrated Social Infrastructure Programs on behalf of Government”.

In pursuit of this mandate, the IDT primarily operates as a strategic partner in the management, integration and implementation of certain government development programs.

The IDT has representation in all the nine (9) provinces and is organized on the basis of regional offices. These offices have the authority to call for bids, conduct evaluation of bids and make recommendations to the Management Bid Adjudication Committee (MBAC) for award of bids.

2. PURPOSE OF EXPRESSION OF INTEREST / BID

The IDT as a custodian of implementing social infrastructure projects on behalf of Government has an obligation to adhere and fully comply with the Standard for Infrastructure Procurement and Delivery Management (*hereinafter referred to as SIPDM*) in all stages of projects which require qualified and experienced Multi-disciplinary professional and stakeholder management service providers (*hereinafter referred to as Project Managers*). This Multi-disciplinary professional and stakeholder management service provider are appointed through competitive bidding in line with the Supply Chain Management (SCM) Policy and SCM National Treasury regulation.

The purpose of this expression of interest is Expressions of interest (EOI) are hereby invited from suitably and qualified multi-disciplinary professional and stakeholder management service providers for the provision of infrastructure professional project and stakeholder management services within the Independent Development Trust for the period of three (3) years with an option to extend for further two (2) years. Qualified provider(s) will be allocated assignment as and when the need arises. The IDT further reserves the right to approach the market (open bid) outside contracts arise from this expression of interest for services whenever it is considered that better value in terms of time, cost and quality may be obtained by doing it that way.

3. SCOPE OVERVIEW

3.1 Objective of this document

Expressions of interest (EOI) are hereby invited from suitably and qualified Multi-disciplinary professional and stakeholder management service providers for the provision of infrastructure professional project and stakeholder management services within the Independent Development Trust for the period of three (3) years with an option to extend for further two (2) years. The professional and stakeholder management service providers are invited to submit EOI's to provide all-inclusive services based on the work package deliverables detailed within this EOI and the appointed service provider is required to form Infrastructure Development Support Team to be submitted with this EOI which will report to the IDT.

3.2 Program Background

The IDT as key government social infrastructure implementing agent, responds to projects implementation instructions from different organs of state for delivery of various social infrastructure projects. The IDT has witness growth in its business portfolio based on business portfolio received from different organs of states in the recent years. The IDT resolved in appointing multi-disciplinary professional service(s) as an efficient and effective procurement strategy in ensuring delivery of Social Infrastructure of Infrastructure Development Support Team (IDST) to execute the proposed projects in order to accelerate the delivery of services.

3.3. Ethical Consideration

At the core of the Built Environment and allied professions, there is a government gazette which is based on a corresponding Act of Parliament. The gazette outlines the tasks and responsibilities typical of each profession at every construction stage, the fee structures, and the typical deliverables of each profession. Each provider(s) is/are expected to abide by any of the Professional Services Contracts available on the market which the IDT may choose to use for specific projects. These include, but are not limited to the Professional Services Agreement (PROCSA), and the CIDB Standard Professional Services Contract and their variations or adaptations that may be tailored to suit the IDT.

The obligations and responsibilities for each part are outlined in these contracts, as well as dispute resolution processes.

Ethical issues such as conflict of interest and corruption, confidentiality and copyright, are covered in the Professional Services Agreements that the IDT may choose to use for particular contracts.

4. SCOPE DESCRIPTION

The services entails provision of engineering support, project management and stakeholder management services in the implementation of social infrastructure projects by suitably & qualified Multi-disciplinary professional delivery of social infrastructure to IDT on behalf of various client government departments. The suitably and qualified Multi-disciplinary professional will be required to provide strategic and operational project management services and establish Project Management Unit (PMU) driven by qualified and experienced Infrastructure Development Support Team (IDST) on projects allocated by the IDT.

The service provider will be required to offer Multi-disciplinary professional services within the built environment and other related service. The scope also includes provision of stakeholder management services, reporting, performing technical support and representing IDT in both strategic and operational meetings relating projects allocated by IDT. The main disciplines required are listed below and the service provider(s) are required to have all disciplines in house in order to be in the position to meet the required scope and specification:

4.1. REQUIRED MAIN DISCIPLINES

- 4.1.1 Project Manager
- 4.1.2 Architects
- 4.1.3 Quantity Surveyors
- 4.1.4 Electrical Engineers
- 4.1.5 Mechanical Engineers
- 4.1.6 Civil Engineers
- 4.1.7 Structural Engineers
- 4.1.8 Occupational Health & Safety
- 4.1.9 Land Surveying
- 4.1.10 Geo-Hydrologist
- 4.1.11 Environmental Specialist

4.2. Sub-Disciplines

Depending on the nature and requirements of specific project(s), request for pricing proposals will be issued out for the following sub-disciplines if required will be added as disbursements to those indicated above and will be indicated accordingly in the pricing proposals / RFQs;

- 4.2.1. Geo-technology
- 4.2.2. Heritage Services
- 4.2.3. Furniture and equipment specialists / Interior designer
- 4.2.4. Information Technology
- 4.2.5. Fire Services
- 4.2.6. Wet Services
- 4.2.7. Landscaping services

4.3. Stakeholder Management

5. BUILT ENVIRONMENT AND ALLIED PROFESSIONS

In submitting this EOI, bidders are obliged to comply with the Built Environment and allied Professions in all stages of project management including pricing of this EOI since majority of disciplines are regulated by their respective professional bodies.

5.1. The scope of work for the built environment professions is outlined as follows: -

- (i) For the Construction Project Management Professionals, scope of services and applicable rates will be in terms of the gazetted rates and services as contained in The South African Council for Project & Construction Management Professionals (SACPCMP) under Section 34(2) of the Project and Construction Management Profession Act, 2000 (Act 48 of 2000).
- (ii) For the Architectural Profession, scope of services and applicable rates will be in terms of the gazette rates and services as contained in The South African Council for the Architectural Profession (SACAP) under Section 34(2) of the Architectural Profession Act 2000 (Act 44 of 2000).
- (iii) For the Quantity Surveying Profession, the scope of services and applicable rates will be in terms of the gazette rates and services as contained in the South African Council for the Quantity Surveying Profession under Section 34(2) of the Quantity Surveying Profession Act 2000 (Act 49 of 2000).
- (iv) For Engineering Professionals (civil, structural, mechanical, electrical etc.) the scope of services and applicable rates will be in terms of the gazetted rates and services as contained in the Engineering Council of South Africa (ECSA) under section 34(2) of Engineering Professions Act, 2000 (Act No. 46 of 2000).
- (v) For the Occupational Health and Safety Profession, the scope of services and applicable rates will be in terms of the gazette rates and services as contained in the tariff of professional fees in terms of the Standard Scope of Services for Construction Health and Safety Agencies as published in (Gazette No. 36525, Board Notice 115 of 2013).
- (vi) For the Geo-Hydrology Profession, the scope of services and applicable rates will be in terms of the gazette rates and services as contained in the South African Council For Natural Scientific Professions Act 2000 (Act 49 of 2000).
- (vii) For the Land Surveying Profession, the scope of services and applicable rates will be in terms of the gazette rates and services as contained in the South African Council for the Land Surveyor Profession under Section 30 of the Geomatics Profession Act 2013 (Act 19 of 2013).
- (viii) For the Environmental Specialist, the scope of services and applicable rates will be in terms of the gazette rates and services as contained in the South African Council for National Scientific Profession under Section 24H of the National Environmental Management Act 1998 (Act 107 of 1998)

5.2. Scope of Allied Professions to the Built Environment and related Professions

The IDT recognizes that it may from time to time need to use professional services which may not necessarily fall under the Built Environment, but which may be critical for successful implementation of various projects, be it on once-off or on continuous basis. Such services, will be source through a request for quotation process.

6. DETAILED PROGRAM SCOPE OF WORK FOR MULTI-DISCIPLINARY PROFESSIONAL SERVICES

The scope of the programme is the provision of multidisciplinary professional services and stakeholder management for management of infrastructure programs for the IDT on behalf of organ of states. The execution of the programme will be performed and managed by the Infrastructure Development Support Team (IDST) in order to accelerate the delivery of services. IDT's involvement will be to ensure that the Terms of Reference (TOR) for procurement of services and goods (materials, PSPs or service providers, contracts) and/or recruitment of personnel, are accurately defined.

6.1. The IDST scope of services will be as follows:

- a) Deliver projects according to the Infrastructure Delivery Management System (IDMS) from the CIDB and National Treasury.
- b) Guided by the IDT, develop Infrastructure Programme Implementation Plan (IPIP) for a specific program allocated to the provider in eradicating the infrastructure backlogs.
- c) Provide all engineering support services in the built environment and allied services as well as stakeholder management which involves social facilitation support through the appointment of resources identified by IDT. The appointed professional team will produce or further develop any existing engineering designs, stakeholder management and communication plan.
- d) The IDST team leader (stakeholder manager) will be dual reporting to the Client as well as to the IDT Project Management & Engineering unit. IDT will engage with the IDST through the stakeholder manager.
- e) Develop and facilitate the implementation of revised programs and initiatives.
- f) Provide project planning, procurement, work plan development and execution.
- g) Use a proven process for work scheduling, cost and quality controls and cost estimation.
- h) Support project scope and risk management and change requests.
- i) Develop and support program communications, project reporting and program status reviews.
- j) Conduct workflow process mapping and implement process efficiency improvements.
- k) Conduct operational reviews and implement standard operating procedures.
- l) Provide contract management services.
- m) Provide contract management for all project under the program including maintaining contract register.
- n) Transfer of skills, the service provider will be required to provider training to identified IDT staff.

- 6.1.1. All the services above, will be managed by the IDST and done in conjunction with the augmentation of IDT. Over and above the following services will also be managed to ensure the successful execution of the project:
- 6.1.2. The IDST will ensure that suitably qualified and competent professionals are appointed in order to capacitate the IDT. The IDT will be involved and responsible for the terms of reference (TOR) clearly indicating the requirements for the specific position that must be advertised as well as the costing structure / financial remuneration package (including the benefits). The IDT will do the appointments based on a fixed term services contract, clearly indicating that the appointment is project specific. The appointment value must be within the funds allowed for, as the payment structures must comply with the IDT standards and levels for the required individuals.
- 6.1.3. The IDT will be required to provide details pertaining to the project, which will be included in the Programme in the applicable financial years. This implies that IDT will have to work closely with the IDST to ensure that proper planning is done, linked to accurate forecasting for time and cost, and will further need to assist with all the required terms of reference to accurately compile tender documentation for the procurement of service providers, contractors, suppliers or resources.

6.2. **Infrastructure programme/ project life-cycle**

The programme and project life-cycle phases below represent a generic approach to implementation of infrastructure programmes and projects. These phases will be aligned to the various sub-programme types and to the project specific requirements when these become known.

The involvement and importance of IDT's role in the compilation of the different ToRs, and the coherence in working together to formulate solutions and delivery of this project, has been vastly emphasized in this document.

6.2.1. **Programme Planning in conjunction with IDT.**

Stage 1: Establish Infrastructure Programme Implementation Plan (IPIP)

- Confirm Budget allocation
- Confirm Projects List
- Prepare Programme Implementation Plan (IPIP)
- Obtain Approval of IPIP

Deliverable/s

- Infrastructure Programme implementation Plan approved (including budget allocation and project approval)
- The IPIP shall be revised/updated to capture any significant changes to the scope of work.
- Approved IPIP.

Stage 2: Infrastructure Programme Mobilised

- Programme management and implementation team(s) established and capacitated
- Forward planning defined (as required to effectively mobilise the projects to be implemented in outer years)
- Prepare a detailed procurement priority list in conjunction with the IDT team.
- Prepare a detailed scope of services required to support IDT.

Deliverable/s

- Programme management resources in place and capacitated.
- Forward planning for future years defined.

Stage 3: Project Delivery

- Scope of all projects confirmed.
- All projects set up (professional teams appointed; steering committees formed & empowered).
- All projects planned, designed and tendered.
- Projects awarded; constructed; handed over for use.
- Projects completed (i.e. project documentation completed and all contracts closed out).
- Forward planning for following year completed as required.

Deliverable/s

- All projects completed to specification within budget and agreed timeframe
- Forward planning completed
- Deliverables will be specific to each work package.

Stage 4: Infrastructure Programme Completion

- Programme evaluated (including evaluation of a sample of projects).
- Programme completion report prepared.
- Programme completion report reviewed and approved.
- Recommendations implemented for following year's programme if required.

Deliverable/s

- Infrastructure Programme evaluated
- Programme completion report approved
- Recommendations for improvements implemented
- Deliverables will be specific to each work package.

6.2.2. Professional Service Provider (PSP) Procurement

Stage 1: Delivery Planning

- Preliminary community consultations regarding community needs.
- Project feasibility evaluation to confirm need for the project, feasibility and scope of work.
- Project scope defined and budgeted.
- Stakeholder engagement and management.
- Project scope approval.
- Confirmation of procurement strategy and implementing arrangements.

Deliverable/s

- Project feasibility confirmed. Applicable to all outstanding feasibilities,
- Project scope approved, and
- Procurement strategy and implementing arrangements approved.
- Deliverables will be specific to each work package.

Stage 2: Professional Services Provided.

- Appointment of Professional Team (Project Manager, Designer, Quantity Surveyor, professional service provider team, etc.).
- Establishment of Community-based Project Steering Committee (PSC).
- Empowerment of the PSC regarding roles and responsibilities.
- Scope of project reviewed and confirmed.

Deliverable/s

- Professional Team appointed,
- Project Steering Committee established and empowered, and
- Scope of project confirmed.
- Deliverables will be specific to each work package.

Stage 3: Design

- Project design.
- Obtaining authorizations and approvals.
- Preparation of tender documents.

Deliverable/s

- Project designed and designs approved, and
- Construction tender documents produced.
- Deliverables will be specific to each work package.

Stage 4: Contractor Procurement

- Tender of project in terms of approved tender document and procurement procedures. Based on the detailed priority procurement list for each work package.
- Tender period.
- Closing of tender.
- Evaluation of tenders and preparation of tender evaluation report with recommended tenderer.

- Review of tender evaluation report and approval for award of tender.
- Appointment of successful tenderer
- Establish Labour desk and prepare localization database including Community Liaison Officer

Deliverable/s

- Contract awarded in terms of approved tender procedure.
- Deliverables will be specific to each work package.

Stage 5: Construction Works & Practical Completion

- Contractor establishment on site.
- Project construction.
- Conflict management.
- Change / variation order controls.
- Monitoring (progress, quality, OHS, etc.).
- Development / social facilitation (stakeholder management, localization, training, youth development, etc.).
- Handover of completed project to client.

Deliverable/s

- Properly constructed project to specification within budget and timeframe,
- Local development, and
- Monthly reporting of progress.
- Deliverables will be specific to each work package.

Stage 6: Final Completion and Hand-over

- As built documentation prepared, approved and archived.
- Operation and maintenance documentation issued.
- Defects attended to, final completion certified, and final account issued at end of defects liability period.
- Confirmation of acceptance by client through feed-back sessions

Deliverable/s

- As built documentation issued, approved and archived,
- Operation and maintenance documentation issued, and
- Contract signed off at end of defects liability period.
- Deliverables will be specific to each work package.

Stage 7: Project Closing

- Submit closeout Report.

6.2.3. Programme Closure

- Submit Programme Closeout Report.

6.3. The Service Provider's appointed on the expression of interest will be responsible for but not limited to the following activities:

- a) Respond to all calls for repairs, remedial work, and replacements;
- b) Supervision for the replacement of damaged, worn out, or broken off fence sections;
- c) Steel palisade, concrete palisade, and all other fencing systems within the organization;
- d) Fencing installation as needed;
- e) Upgrades and Additions of government existing structures;
- f) Construction of new government buildings
- g) Water and Sanitation Services
- h) Installation of Boreholes
- i) Conduct investigations and provide corrective action on all work pertaining to various construction projects within the IDT Organization;
- j) Responds to all requests as they come in and identifies repair work-related activities with the organization.
- k) Betterment and Graveling of Roads
- l) Construction of New Roads
- m) Upgrade of Gravel Road to Blacktop Roads
- n) Rehabilitation of Blacktop Road (Light and Heavy)
- o) Blading of Gravel Roads
- p) Construction of Culverts
- q) Construction of New Bridges and Rehabilitation
- r) Emergency Road Repairs
- s) Blacktop Patching
- t) Construction of Sidewalk

6.4. Stakeholder management

- As part of scope of work, it is required that program includes stakeholder management to be led by stakeholder program leader to be an interlink between IDT, Client Department, IDST and other relevant stakeholders.
- The stakeholder management leader will provide resources and support for the program and is accountable for enabling success.
- The stakeholder management team leader will be required to present reports to all stakeholders and be an interface of the program.
- The stakeholder management leader must be primary responsible for streamlining communications channels for the entire program.
- Facilitate program negotiations among all affected stakeholders and ensure decisions are being implemented related to the program.

7. GOVERNANCE AND ACCOUNTABILITY

The IDT's Supply Chain Management Policy and Procedures will apply during the bidding process. The successful provider(s) will be held to the strictest letter of the law when complying with the governing body for the respective professional bodies, as explained in Sections (5.1) and (5.2) of this document. As a matter of principle for the successful outcome of the project/s, impeccable and scrupulous professional conduct will be expected at all times.

8. STAGE ONE (1) EVALUATION CRITERIA: MANDATORY REQUIREMENTS (PART 1)

Failure to submit one of the mandatory requirements listed below shall result in the bid being non-responsive and shall be disqualified:

- (i) Detailed full CIPC certificate or other authentic proof of company ownership documents.
- (ii) Certified ID Copies of Directors (certification not older three (3) months from bid closing date)
- (iii) Submit CV and certified Qualifications for Professionally Registered Company Director as per (i) (at least one director must be registered with **SACPCMP**)
- (iv) Valid Active Proof of professional registration of the company director/(s) and other proposed resources (certification not older three (3) months from bidclosing date)
- (v) Proof of National Treasury (NT) Central Supplier Database Registration i.e. submit a copy of CSD Master Registration Number (Supplier Number)
- (vi) Valid tax certificate with tax complaint PIN
- (vii) Compensation for Occupational Injuries and Diseases Act Certificate (COIDA) or Federated Employers Mutual Assurance (FEMA) Insurance.
- (viii) Recent/Latest three year signed Annual Financial Statements (AFS).
- (ix) Notarised Joint Venture Agreement (where applicable),
- (x) Fully completed and signed Standard Bidding Documents as contained in the bid document (SBD 1; SBD 4; SBD 6.1)
- (xi) Signed authority to sign on behalf of the bidding entity (i.e. Signed by the company director)

Note: Failure to comply with any of the above-mentioned requirements shall render the bid non-responsive and shall result in automatic disqualification of the bid response.

9. STAGE ONE (1) EVALUATION CRITERIA: SPECIAL AND PRE-QUALIFICATION CRITERIA (PART B)

9.1. Qualifications of the professional team

In addition to the mandatory requirements listed under item 8, bidders are required to submit the following information in order to qualify for functionality/Technical Evaluation:

CV and Certified qualification for professional registered team as listed below:

- a. Project Manager (**registered with SACPCMP**). Other than company Director.
- b. Civil Engineer (**registered with ECSA**)
- c. Structural Engineer (**registered with ECSA**)
- d. Electrical Engineer (**registered with ECSA**)
- e. Mechanical Engineer (**registered with ECSA**)
- f. Electrical Engineer (**registered with ECSA**)
- g. Architecture (**SACAP**)
- h. Quantity Surveyor (**ASAQS**)
- i. Occupational Health & Safety (**OHS professional body**).

- 9.2. All professional team listed on 9.1. (a) to (i) must have a minimum of 5 years' post qualification experience in the field of specialization.
- 9.3. In the case of foreign qualifications these should be SAQA approved;
- 9.4. The provider must ensure that they always have Professionally Registered Director within their company throughout the duration of the contract.
- 9.5. The IDT shall not be liable to reimburse any costs incurred by the bidder during this bidding process.
- 9.6. Request for clarification must be directed to the dedicated email five (5) working days before the closing date & time, as stated in the cover page.
- 9.7. Communication between the IDT and the bidder/s shall be in writing and shall be in the English language. The IDT shall not take any responsibility for non-receipt of communications from or by a bidder/s.
- 9.8. Evaluation of this bid shall be carried out by the IDT's Bid Evaluation Committee (BEC). The Evaluator(s) shall, if necessary, contact bidders to seek clarification of any aspect of the bid.
- 9.9. Bidders are prohibited to make any alterations or additions to this bid document, except to comply with instructions issued by the IDT. All signatories to the bid offer shall initial all such alterations. Erasures and the use of masking fluid are prohibited.

10. STAGE TWO (2) EVALUATION CRITERIA FUNCTIONALITY/ TECHNICAL EVALUATION CRITERIA

Only bidders who met all requirements set under stage 1 will be evaluated further on stage 2 as follows:

10.1.1. Evaluation Criteria

The bids will be evaluated on functionality. Entities must score a minimum of 70% on functionality to qualify for further evaluation for price proposal.

Functionality Criteria

NO	POSSIBLE MAXIMUM SCORE	POSSIBLE MAXIMUM SCORE
1	Relevant experience on similar projects	35
2	Client Reference on similar projects	10
3	Qualification, Registration and Experience of key personnel	35
4	Project methodology and delivery model	20
TOTAL		100

Criteria 1: Company's experience in managing multidisciplinary professional in the construction projects

(35 points):

Points are allocated for the bidding entity's experience in managing multi-disciplinary construction related projects **completed** (not currently running) in the past 15 years. The experience refers to projects managed by the entity which are largely comprised of all types of construction works which have the complexity and value in accordance with the estimated construction cost for this project. **Bidder will only receive points for project(s) where they managed different disciplines under one project as project manager or principal agent.** No points will be allocated where a bidder provided experience for 1 or 2 discipline(s) in a single project. Letters must be signed and be in the Client's letter head with traceable contact details for verification and due diligent exercise.

Criteria 2: Client References on multidisciplinary professional in the construction projects

(10 points):

Points allocated for performance of the bidders on previous projects completed. Client Reference schedule shall be submitted for scoring. Bidders must complete client reference templates contained in this bid document in order to be considered. The bidder must obtain client reference of project listed under criteria 1 above.

Criteria 3: Qualification, Registration and Experience of key personnel (35 points):

Points are allocated for professional qualifications, professional registration and experience of allocated key personnel for the bid under consideration. For each key personnel allocated to the project, the bidder shall submit the following: Curriculum Vitae together with certified proof of qualifications and professional registration.

Criteria 4: Project methodology and delivery model (20 points):

The bidder must submit detailed project methodology and delivery model which will be deployed in the program implementation and bidders shall cover the following areas:

- System to be used in implementing and managing program
- Detailed program implementation plan for a period of 36 months.
- Deployment of human resources within the program
- Role of stakeholder management strategy
- Reporting methodology
- Communication strategy

Evaluation points will be awarded in terms of the following tables:

i. **EVALUATION CRITERIA FOR PROJECT MANAGERS**

Company experience in managing building projects (35 points)

PROJECT	POINTS
One (1) Completed Project	05 points
Two (2) Completed Projects	15 Points
Three (3) Completed Projects	25 Points
Four (4) Completed Projects	30 Points
Five (5) Completed Projects	35 Points
SUB-TOTAL NUMBER OF POINTS	35 POINTS

Client References on company’s experience in managing building projects (10 points):

Evaluation sub-criteria: Client’s Reference (10 points)				
Projects	Overall assessment by Client			
	Poor	Fair	Good	Excellent
Project 1	0	1	2	3.34
Project 2	0	1	2	3.33
Project 3	0	1	2	3.33
Total number of points	0	3	6	10

Qualifications of Proposed Resources (35 Points)

10.1.2.3 – Evaluation sub-criteria: Experience of proposed key personnel(12 points)			
Name of Proposed Personnel	Professional registered program leader and project manager post professional registration (12 points)		
	Less than 5 Years	5 - 10 Years	Over 10 Years
Accountable professional: Project Leader	2.5	4	6
Responsible Professional: Project Manager	2.5	4	6
Sub-total number of points	5	8	12

Project methodology and delivery model (20 points): (12 points)

Project	Project fees less than R1 million	Project fees between than R1 – R5 million	Project fees between R5– R10 million	Project fees over R10 million
Project 1	0	1,5	3,5	4,00
Project 2	0	1,5	3,5	4,00
Project 3	0	1,5	3,5	4,00
Sub-total number of points	0	4,5	10,5	12

NB// bidders may use similar resources submitted under section 9 of this documents for the purpose of functionality scoring.

Experience of Proposed Resources

10.1.6.3 – Evaluation sub-criteria: Experience of proposed key personnel(11 points)			
Name of Proposed Personnel	Stakeholder management leader (11 points)		
	Less than 10 Years	10 - 20 Years	Over 20 Years
Stakeholder management leader	2.5	5	11
Subtotal number of points	2.5	5	11

The stakeholder management leader must hold at least NQF level 6 qualification and submit CV indicating experience in managing multiparty project implementation experience.

Company experience in managing building projects (20 points)

PROJECT	POINTS
Non submission	00 Points
Poor methodology	05 Points
Moderate Methodology	10 Points
Good Methodology	15 Points
Excellent Methodology	20 Points
SUB-TOTAL NUMBER OF POINTS	20 POINTS

11. STAGE 3 – PRICE AND SPECIFIC GOALS EVALUATION

- (i) Bidders are required to submit price proposal on fee structure to be costed to IDT for program management as per specification.
- (ii) IDT may apply 80/20 or 90/10 price and specific goals evaluation on shortlisted bidders depending on program budget in line with SCM IDT Policy and PFMA regulations.
- (iii) Bidders are required to charge a percentage fee based on project budget and such percentage must be broken down in to stages.
- (iv) Bidders will be required to charge professional fees in line with gazette set by professional body during project implementation.
- (v) IDT reserves the rights to enter in to price/ fee negotiations including request discount with recommended bidder(s).
- (vi) IDT will consider specific goals score as set out in the IDT SCM policy when evaluating price for bidders who met the 70% functionality threshold.
- (vii) IDT reserves a right to appoint more than one (1) service providers which will be guided by the evaluation outcome.
- (viii) IDT reserves the right to invites shortlisted bidders for presentation which will be communicated in writing before finalization of bidding process.

11.1. General Condition

- (i) The tender shall be valid for 120 calendar days from bid closing date.
- (ii) No late, bids, copies, e-mailed or faxed documents will be considered.
- (iii) Bids must be submitted by no later than 11h00 on Monday 20 May 2024. Any bid documents received after closing date and time will not be considered.

11.2. DISCLAIMER

- (i) IDT reserves the right to cancel or withdraw this expression of interest without prior notice and without furnishing any reasons whatsoever.
- (ii) Should the bid be cancelled by the IDT, for any reasons, the IDT shall not be liable to remunerate the service provider for any potential loss of business and any cost/s incurred in relation to bid.

DECLARATION THAT INFORMATION ON CENTRAL SUPPLIER DATABASE (CSD) IS CORRECT AND UP TO DATE

(To be completed by bidder)

THIS IS TO CERTIFY THAT I (name of bidder/authorised representative)

.....

WHO REPRESENTS (state name of bidder)

.....

I AM AWARE OF THE CONTENTS OF THE CENTRAL SUPPLIER DATABASE WITH RESPECT TO THE BIDDER'S DETAILS AND REGISTRATION INFORMATION, AND THAT THE SAID INFORMATION IS CORRECT AND UP TO DATE AS ON THE DATE OF SUBMITTING THIS BID.

AND I AM AWARE THAT INCORRECT OR OUTDATED INFORMATION MAY BE A CAUSE FOR DISQUALIFICATION OF THIS BID FROM THE BIDDING PROCESS, AND/OR POSSIBLE CANCELLATION OF THE CONTRACT THAT MAY BE AWARDED ON THE BASIS OF THIS BID.

.....

SIGNATURE OF BIDDER OR AUTHORISED REPRESENTATIVE

DATE:.....

**SPECIAL INSTRUCTIONS AND NOTICES TO BIDDERS REGARDING THE
COMPLETION OF BIDDING FORMS**

PLEASE NOTE THAT THIS BID IS SUBJECT TO TREASURY REGULATIONS 16A ISSUED IN TERMS OF THE PUBLIC FINANCE MANAGEMENT ACT.

1. Unless inconsistent with or expressly indicated otherwise by the context, the singular shall include the plural and vice versa and with words importing the masculine gender shall include the feminine and the neuter.
2. Under no circumstances whatsoever may the bid forms be retyped or redrafted. Photocopies of the original bid documentation may be used, but an original signature must appear on such photocopies.
3. The bidder is advised to check the number of pages and to satisfy himself that none are missing or duplicated.
4. Bids submitted must be complete in all respects.
5. Bids shall be lodged at the address indicated not later than the closing time specified for their receipt, and in accordance with the directives in the bid documents.
6. Each bid shall be addressed in accordance with the directives in the bid documents and shall be lodged in a separate sealed envelope, with the name and address of the bidder, the bid number and closing date indicated on the envelope. The envelope shall not contain documents relating to any bid other than that shown on the envelope. If this provision is not complied with, such bids may be rejected as being invalid.
7. All bids received in sealed envelopes with the relevant bid numbers on the envelopes are kept unopened in safe custody until the closing time of the bids. Where, however, a bid is received open, it shall be sealed. If it is received without a bid number on the envelope, it shall be opened, the bid number ascertained, the envelope sealed and the bid number written on the envelope.
8. A specific box is provided for the receipt of bids, and no bid found in any other box or elsewhere subsequent to the closing date and time of bid will be considered.
9. No bid sent through the post will be considered if it is received after the closing date and time stipulated in the bid documentation, and proof of posting will not be accepted as proof of delivery.
10. No bid submitted by telefax, telegraphic or other electronic means will be considered.
11. Bidding documents must not be included in packages containing samples. Such bids may be rejected as being invalid.
12. Any alteration made by the bidder must be initialled.
13. Use of correcting fluid is prohibited
14. Bids will be opened in public as soon as practicable after the closing time of bid.
15. Where practical, prices are made public at the time of opening bids.
16. If it is desired to make more than one offer against any individual item, such offers should be given on a photocopy of the page in question. Clear indication thereof must be stated on the schedules attached.
17. The bidder must initial each and every page of the document.

12. CERTIFICATION OF CORRECTNESS OF INFORMATION SUPPLIED IN THIS DOCUMENT

I/we, THE UNDERSIGNED, WHO WARRANT THAT I AM DULY AUTHORISED TO DO SO ON BEHALF OF THE BIDDER, CERTIFY THAT THE INFORMATION SUPPLIED IN TERMS OF THIS DOCUMENT IS CORRECT AND TRUE, THAT THE SIGNATORY TO THIS DOCUMENT IS DULY AUTHORISED AND ACKNOWLEDGE THAT:

7.(1) The bidder will furnish documentary proof regarding any bidding issue to the satisfaction of the Province, if requested to do so.

7.(2) If the information supplied is found to be incorrect and/or false then the Province, in addition to any remedies it may have, may:-

(a) Recover from the contractor all costs, losses or damages incurred or sustained by the Province as a result of the award of the contract, and/or

(b) Cancel the contract and claim any damages which the Province may suffer by having to make less favourable arrangements after such cancellation.

SIGNED ON THIS DAY OF 20 AT

.....
**SIGNATURE OF BIDDER OR DULY
AUTHORISED REPRESENTATIVE**

.....
NAME IN BLOCK LETTERS

ON BEHALF OF (BIDDER'S NAME)

CAPACITY OF SIGNATORY

NAME OF CONTACT PERSON (IN BLOCK LETTERS, PLEASE)

.....
POSTAL ADDRESS

.....
TELEPHONE NUMBER:

FAX NUMBER:

CELLULAR PHONE NUMBER:

E-MAIL ADDRESS:

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (INDEPENDENT DEVELOPMENT TRUST (IDT))							
BID NUMBER:	IDT-MDPS-2024-2027	CLOSING DATE: 20 MAY 2024	CLOSING TIME:	11:00			
DESCRIPTION	EXPRESSION OF INTEREST: MULTI-DISCIPLINARY PROFESSIONAL SERVICES TO THE INDEPENDENT DEVELOPMENT TRUST FOR STRATEGIC INFRASTRUCTURE MANAGEMENT PROGRAMME FOR THE PERIOD OF THREE (3) YEARS WITH AN OPTION TO EXTEND FOR FURTHER TWO (2) YEARS						
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)							
INDEPENDENT DEVELOPMENT TRUST							
22 DOROTHY NYEMBE STREET							
04TH FLOOR THE MARINE BUILDING							
DURBAN 4001							
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO				TECHNICAL ENQUIRIES MAY BE DIRECTED TO:			
CONTACT PERSON	Mukelani Mdlalose			CONTACT PERSON	Mlungisi Khumalo		
TELEPHONE NUMBER	031 369 7400			TELEPHONE NUMBER	031 369 7400		
FACSIMILE NUMBER	N/A			FACSIMILE NUMBER	N/A		
E-MAIL ADDRESS	mukelanim@idt.org.za			E-MAIL ADDRESS	mlungisik@idt.org.za		
SUPPLIER INFORMATION							
NAME OF BIDDER							
POSTAL ADDRESS							
STREET ADDRESS							
TELEPHONE NUMBER	CODE			NUMBER			
CELLPHONE NUMBER							
FACSIMILE NUMBER	CODE			NUMBER			
E-MAIL ADDRESS							
VAT REGISTRATION NUMBER							
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:			OR	CENTRAL SUPPLIER DATABASE No:	MAAA	
SBD 6.1 REQUIREMENT MUST BE COMPLIED TO CLAIM POINTS ON SPECIFIC GOALS							
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 THE QUESTIONNAIRE BELOW]		
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS							
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?						<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?						<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?						<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?						<input type="checkbox"/> YES <input type="checkbox"/> NO	
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?						<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 REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.							

**PART B
TERMS AND CONDITIONS FOR BIDDING**

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. **ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.**
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. **THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

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

SIGNATURE OF BIDDER:

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

DATE:

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the **80/20** system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the **90/10** system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 **To be completed by the organ of state**

(delete whichever is not applicable for this tender).

a) The applicable preference point system for this tender is the **80/20** preference point system.

b) **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS	
PRICE	90	80
SPECIFIC GOALS	10	20
TARGETED GROUP		
Women	3	6
Youth	3	6
People with Disabilities	2	4
Black	2	4
Total points for Price and SPECIFIC GOALS	100	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) “the Act” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women	3	6		
Youth	3	6		
People with Disabilities	2	4		
Black	2	4		

Source Documents to be submitted with the Bid or RFQ

- *CIPC Document (Company Registration Document will be required for verification (CIPC DOC))
- *Woman (Originally Certified ID Document)
- *Youth (Originally Certified ID Document)
- *People with Disability (Letter from the Dr. Confirming the Disability)
- *Black Ownership (Originally Certified ID Document)

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

<p>.....</p> <p>SIGNATURE(S) OF TENDERER(S)</p>	
SURNAME AND NAME:
DATE:
ADDRESS:

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

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

2.2.1. If so, furnish particulars:

.....

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

2.3.1 If so, furnish particulars:

.....

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

3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.
 I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF

PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

..... Signature Date
..... Position Name of bidder

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

EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points.

The following are to be completed by the Client

PROJECT 1:

Name of Project:.....

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:.....

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.34)
Cost management				
Timeous compilation of final account/as-built				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature:

Date:

Company
Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points.

The following are to be completed by the Client

PROJECT 2:

Name of Project:.....

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:.....

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.33)
Cost management				
Timeous compilation of final account/as-built				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature:

Date:

Company
Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points.

The following are to be completed by the Client

PROJECT 3:

Name of Project:.....

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:.....

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.33)
Cost management				
Timeous compilation of final account/as-built				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature:

Date:

Company Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES (FOR OHS ONLY)

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points.

The following are to be completed by the Client

PROJECT 1:

Name of Project:

Name of Firm/Bidder:.....

Client/Client Department:

Contract Amount:

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.34)
Capability to design, implement and manage Health & Safety requirements				
Timeous compilation of monthly audit reports				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature:

Date:

Company Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES (FOR OHS ONLY)

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points.

The following are to be completed by the Client

PROJECT 2:

Name of Project:

Name of Firm/Bidder:

Client/Client Department:

Contract Amount:

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.33)
Capability to design, implement and manage Health & Safety requirements				
Timeous compilation of monthly audit reports				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature: **Date:**

Company Stamp

EVALUATION SCHEDULE: CLIENT REFERENCES (FOR OHS ONLY)

The Tenderer shall provide details of his performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” will be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule. Uncompleted and Unsigned forms by the client will score zero points.

The following are to be completed by the Client

PROJECT 3:

Name of Project:

Name of Firm/Bidder:

Client/Client Department:

Contract Amount:

Contract Duration:

Actual Contract Duration:

Description / Performance	Poor (0)	Fair (1)	Good (3)	Excellent (4.33)
Capability to design, implement and manage Health & Safety requirements				
Timeous compilation of monthly audit reports				
Timeous co-operation during the contract				
Quality of service				
Quality of reports				
Performance of resources				
Technical experience of resources				

Any other remarks considered necessary to assist in evaluation of the Tenderer?

Name of Client Representative:

Designation:

Telephone:

Client Signature: **Date:**

Company
Stamp

Returnable Documents

List of returnable documents are for ensuring that everything the employer requires a tenderer to submit with his tender is included in, or returned with, his tender submission. Tick below if returnable document is attached or completed properly.

#	LIST OF RETURNABLE DOCUMENTS	TICK IF ATTACHED
1	Professional Registration of the Director	
2	Proof of company physical address	
3	Proof of CSD registration	
4	Supporting documents for Preferential Goal Points	
5	Valid Vat Certificate	
6	Tax Clearance Certificate with PIN	
7	Joint Venture Agreement Between Parties (If Applicable)	
8	Bank Account Confirmation Letter	
9	Certified copies Identity Documents	
10	Copy of a Valid Letter of Good standing with Compensation For Occupational And Injuries Diseases Act (COIDA) Registration Certificate	
11	SBD Forms (SBD 1; 4; 6.1)	
12	Certificate of Authority for Signatory	
13	Record of Addenda to the tender documents if applicable	
14	Amendments, Qualifications And Alternatives	

#	LIST OF RETURNABLE DOCUMENTS	TICK IF ATTACHED
15	Project Experience	
16	Letters of Appointment, and Relevant Completion Certificates (Practical Completion, Work Completion & Final Completion)	
17	Client References	
18	Key Personnel (CV'S; Certified Qualification & Professional Registration)	
19	Recent three (3) years approved annual financial statements	