



OPEN TENDER

**PROCUREMENT OF A MODERN TECHNOLOGY SOLUTION FOR THE
INDEPENDENT DEVELOPMENT TRUST (IDT) ELECTRONIC PROGRAMME
AND PROJECT MANAGEMENT INFORMATION SYSTEM
(e-PPMIS)**

Tender Number: [IDT-NAT-ePPMIS-2022](#)

**Closing date:
Tuesday 13th DECEMBER 2022 at 12h00pm**

ISSUED BY:

**THE INDEPENDENT DEVELOPMENT TRUST
IDT HEAD OFFICE
CORNER OBERON AND SPRITE STREETS
GLENWOOD OFFICE PARK
FAERIE GLEN
0043**

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1. TENDER DETAILS

1.1 Invitation to Bid

The Independent Development Trust (**hereinafter “IDT”**) invites companies with extensive experience in the development and commissioning of Electronic **PROGRAMME AND PROJECT INFORMATION MANAGEMENT SYSTEM (e-PPMIS)** in the public sector.

Driven by the IDT Vision of being “A leading public sector developmental programme implementation management agency”, continuous improvement to institute best programme and project management practices in supporting various clients department in the delivery of social and basic services infrastructure and related development objectives, is imperative to achieve efficiency to meet the client demands. The IDT initiated a multiyear project named “Programme/Project Management System (PPMS) which focuses on the improvement and integration of programme and project delivery management systems and processes governed by the Built Environment and the Public Sector Standards and Practices.

The ultimate objective of the project is to acquire an existing or develop an electronic Project Management System that can be customised to the IDT Programme/Project Management System requirements. The electronic system should include workflows in line with the IDT programme and project management processes as well as automation, and it should be able to shorten the IDT’s project delivery periods by eliminating inefficiencies and creating a robust electronic “audit-trail”. The system must be aligned with the Public Sector IDMS and FIPDM Standards and Processes. The scope of the project includes commissioning / implementation of the system and a minimum of three (3) years maintenance and support as part of the proposal.

A compulsory briefing session will be held on Thursday, **17th November 2022 at 10:00** at the IDT Head offices in Pretoria.

The Tender closes on **13th December 2022 at 12:00PM**. Original bids must be submitted and deposited in the Tender Box at the **IDT Head Office, Corner Oberon and Sprite Streets, Glenwood Office Park, Faerie Glen, 0043**. Telegraphic, telephonic, telex, facsimile, e-mail and late tenders WILL NOT be accepted.

Functionality criteria scoring will be evaluated in two (2) phases. Only bidders scoring 60 points (out of 90 points) and above under Phase one (1) of functionality criteria will be eligible to be evaluated further under Phase two (2) which entails the presentation and interview process with the client.

Bidders must be prepared to do a 30 minutes presentation and 30 minutes question and answer session. The presentation should be focussed on a Brief System Overview, Approach and Methodology, Application of Modern Technologies among others. The presentation will be on a **Virtual Platform** with the Bidders representative and the Bid Evaluation Committee. Only bidders that again obtain a combination of minimum total 70 points under functionality will be evaluated on Price and BBB-EE based on 80/20 or 90/10 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) 2017.

Table1: Phase 1 evaluation under functionality criteria is as follows:

| Phase | Criteria | Points Allocation |
|-----------------|--|-------------------|
| Phase I | Bidders Experience in the Similar Projects | 35 points |
| | Team Members | 15 points |
| | System Proposal | 25 points |
| | Mandatory System Functionality Requirements | 20 points |
| | Total | 90 points |
| | <i>Only bidders scoring 60 points and above under these Phase of functionality criteria will be eligible to be evaluated under second Phase which entails the interview and presentation process with the client.</i> | |
| Phase II | Bidders Presentation | 10 points |
| | Total | 100 points |
| | <i>Only bidders that again obtain a combination of minimum total 70 points under Phase I and Phase II Evaluation will be evaluated further on Price and BBB-EE based on 80/20 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) 2017</i> | |

Tender documents will be available from the IDT website at www.idt.org.za and from the National Treasury e-Tender Portal at www.etenders.gov.za free of charge from **Thursday, 10th November 2022**.

Enquiries should be directed to the following contacts:

- For Technical matters related queries: Attention **Mr. Richard Maloka**, e-mail: pmsusystems@idt.org.za
- For Supply Chain Management (SCM) related queries, Attention, e-mail: **Mr. Melvin-Eugene Moroka**: pmsusystems@idt.org.za

1.2 Tender Data

The IDT Standard Conditions of Tender make several references to the Tender Data for details that apply specifically to this bid. The Bid Data shall have precedence in the event of any ambiguity or inconsistency between it and the Standard Conditions of Tender.

Each item of data given below is cross-referenced to the clause in the Standard Conditions of Tender to which it mainly applies.

| Clause number | Tender Data / Clause description |
|---------------|--|
| 1.2.1 | <p>The Employer is Independent Development Trust (hereinafter “IDT”)</p> <p>Physical address:</p> <p>IDT Head Office</p> <p>Corner Oberon and Sprite Streets</p> <p>Glenwood Office Park</p> <p>Faerie Glen 0043</p> <p>Tel: (012) 845 2000 - Fax: 086 589 6855</p> <p>Website: www.idt.org.za</p> |

| Clause number | Tender Data / Clause description |
|---------------|---|
| 1.2.2 | <p>Only those bidders who satisfy the following compulsory requirements are eligible to submit tenders:</p> <ul style="list-style-type: none"> • Submission of Standard Bidding Documents <ul style="list-style-type: none"> ○ SBD 1 (Invitation to Bid) ○ SBD 4 (Bidders Declaration Form) ○ SBD 6.1 (Preference Points Claims Form in Terms of the Preferential Procurement Regulations 2017) • Valid Tax Status Compliance Pin (<i>Bidders tendering as joint ventures / consortiums are required to submit a Separate Valid Tax Status Compliance Pin for each individual entity</i>) • CIPRO Registration Documents (<i>Bidders tendering as joint ventures / consortiums are required to submit a Separate CIPRO Documents for each individual entity</i>) |
| 1.2.3 | <p>A compulsory briefing session will be held on 17th November 2022 at 10:00 at the IDT offices in Pretoria. Independent Development Trust, Glenwood Office Park, Cr Oberon and Sprite Street, Faerie Glen, Pretoria East, 0045</p> |
| 1.2.4 | <p>Prospective bidders are encouraged to submit their requests for clarification in writing not later than 5 calendar days before the closing date.</p> |
| 1.2.5 | <p>The tender shall be for the entire scope as defined in the Terms of Reference</p> |
| 1.2.6 | <p>The Tender Validity period is 90 days from the closing date.</p> |
| 1.2.7 | <p>The Tender shall be submitted as follows in one envelope</p> <ol style="list-style-type: none"> 1. Hard Copies of the Bid following the structure in <u>section 1.2.8</u> below 2. Memory stick of the copy of the Bid |

| Clause number | Tender Data / Clause description |
|---------------|---|
| 1.2.8 | <p>To facilitate the tender evaluation process, the bidders are encouraged to compile their Tender Document following the order below.</p> <p>PART 1: Compulsory Documents</p> <p>PART 2: Company's experience in Similar Project Profile and Reference Letters</p> <p>PART 3: Company Team Members (Dedicated to this bid)</p> <p>PART 4: System Proposal</p> <p>PART 5: Mandatory System Functionality Proposal</p> <p>PART 6: Costing Breakdown (using the attached form in the bid)</p> |
| 1.2.9 | The Invitation to Tender number is IDT-NAT-ePPMIS-2022 |
| 1.2.10 | The deadline for tender submission is 13th December 2022 at 12:00PM |
| 1.2.11 | Public opening of the Bids documents is APPLICABLE |

| Clause number | Tender Data / Clause description |
|---------------|---|
| 1.2.12 | <p>The tender shall be addressed to the Employer with a cover page indicating the following:</p> <p>INDEPENDENT DEVELOPMENT TRUST (IDT)</p> <p>PROCUREMENT OF A MODERN TECHNOLOGY SOLUTION FOR THE INDEPENDENT DEVELOPMENT TRUST (IDT) ELECTRONIC PROGRAMME AND PROJECT MANAGEMENT INFORMATION SYSTEM (e-PPMIS)</p> <p>MARKED AS TENDER REF: IDT-NAT-ePPMS-2022</p> <p>BIDDER NAME: _____</p> <p>COMPANY REGISTRATION NUMBER: _____</p> <p>Physical Address for delivery of tender:</p> <p>IDT Head Office</p> <p>Glenwood Office Park</p> <p>Corner Oberon and Sprite Streets</p> <p>Faerie Glen 0043</p> |
| 1.2.13 | <p>The place for delivery of the tender is:</p> <p>The IDT Tender Box located at (main reception at the physical address given above)</p> |
| 1.2.14 | <p>The Bids will be evaluated on comparative basis in terms of IDT SCM Policies and Procedures.</p> |

| Clause number | Tender Data / Clause description |
|---------------|--|
| 1.2.14 | <p>Functionality criteria scoring will be evaluated in two (2) phases.</p> <ul style="list-style-type: none"> • Only bidders scoring 60 points and above under phase one (1) of functionality criteria will be eligible to be evaluated under • Phase two (2) which entails the presentation, focusing on a Brief System Overview, Approach and Methodology, Application of Modern Technologies, System Implementation Turnaround time among others. The presentation will be on a Virtual Platform with the Bidders representative and the Bid Evaluation Committee. • Only bidders that again obtain and pass the total 70 points in Phase I and Phase II thresholds of the functionality criteria will qualify to be evaluated further on Price and BBB-EE point scoring system |

1.3 Evaluation Criteria

1.3.1 STAGE 1: Compulsory Requirements

Only those bidders who satisfy the following compulsory requirements are eligible to submit tenders:

- Submission of Standard Bidding Documents
 - **SBD 1** (Invitation to Bid)
 - **SBD 4** (Bidders Declaration Form)
 - **SBD 6.1** (Preference Points Claims Form in Terms of the Preferential Procurement Regulations 2017)
- Valid Tax Status Compliance Pin (*Bidders tendering as joint ventures / consortiums are required to submit a Separate Valid Tax Status Compliance Pin for each individual entity*)
- CIPRO Registration Documents (*Bidders tendering as joint ventures / consortiums are required to submit a Separate CIPRO Documents for each individual entity*)
- Cost Form (Page 31 of the ToR)

1.3.2 STAGE 2 (Phase I): Evaluation on Functionality / Technical Requirements

As part of the evaluation process of the current existing systems, IDT may undertake site visit to current/previous clients that use/used the bidders existing proposed Electronic System. It is expected from the bidders to inform their client/s of potential site visit.

All corresponding supporting documents must be compiled as per Instruction 1.2.8 as per Tender Data in Section 1.2 above. Submissions will be scored according to the scoring sheet in Table 2 below.

Table 2:

| VARIABLES | TOTAL POINTS | CRITERIA | DESCRIPTION | POINTS |
|--|--------------|--|--|-----------|
| 1. BIDDERS EXPERIENCE IN RELEVANT OR SIMILAR PROJECTS AND REFERENCE LETTERS FROM SIMILAR PROJECTS IN THE PAST 5 YEARS (With supporting evidence, Reference Letters and List of Commissioned Projects with contact details) | 35 | More than 5 Years in Programme and Project Management System Development | Bidder Experience and Track-record on Electronic System Implementation | 15 |
| | | Between 4 Years and 3 Years in Project Management System Development | | 5 |
| | | Less than 2 Years in Project Management System Development | | 3 |
| | | 3 Reference Letters | | 20 |
| | | 2 Reference Letters | | 15 |
| | | 2 Reference Letters | | 5 |
| | | | | |
| 2. TEAM MEMBERS (With CVs) | 5 | Project Lead (+5 Years' Experience) | Bidders team dedicated to the project | 5 |
| | | Project Lead (between 4- and 3-Years' Experience) | | 3 |
| | | Project Lead (Less than 2 Years' Experience) | | 0 |
| | 5 | Business Analyst (+5 Years' Experience) | | 5 |
| | | Business Analyst (between 4- and 3-Years' Experience) | | 3 |
| | | Business Analyst (Less than 2 Years' Experience) | | 0 |
| | 5 | Development Lead (between 4- and 3-Years' Experience) | | 5 |
| | | Development Lead (Less than 2 Years' Experience) | | 3 |
| | | | | 0 |

| VARIABLES | TOTAL POINTS | CRITERIA | DESCRIPTION | POINTS |
|-----------------------------------|--------------|--|-------------|--------|
| 3. SYSTEM PROPOSAL | 25 | Meets All the Requirements (Proposed Solutions addresses all modules -100%) | | 25 |
| 4. MANDATORY SYSTEM FUNCTIONALITY | 15 | Meets All the Requirements (Proposed Solutions addresses functionality requirements) <ul style="list-style-type: none"> Automated Workflow Automated Form Builder (non-coding) Automated Electronic Signatures Automated Electronic Document and Records Management Mobile Application Security | | 15 |

1.3.3 STAGE 2 (Phase II): Bidders Presentation

Bidders must be prepared to do a **60 minutes** presentation/interview (30 minutes for presentation by the bidder and 30 minutes for Q&A). The presentation should focus on a Brief System Overview, System or Wireframe Demonstration, Implementation Turnaround time among others. The presentation will be on a **Virtual Platform** with the Bidders representative and the Bid Evaluation Committee. Only bidders that again obtain and pass the total 70 points thresholds of the functionality criteria will qualify to be evaluated further on Price and BBB-EE point scoring system

The Table below, specify in detailed the functionality/technical criteria to be considered under the evaluation of phase one (2): Bidders Presentation

Table 2

| VARIABLES | TOTAL POINTS | CRITERIA | DESCRIPTION | POINTS |
|-------------------------|--------------|---|--------------------------------------|--------|
| 5. BIDDERS PRESENTATION | 10 | System Commissioned and /or Developed or Wireframes Demonstration | Bidders Proposed System Presentation | 3 |
| | | System User Friendliness Demonstration | | 3 |
| | | Mandatory System Functionality Demonstration | | 4 |

| | | | | | |
|-------|------|---------|------|-----------|-----------|
| 0 - 4 | 0 | 1 | 2 | 3 | 4 |
| | Poor | Average | Good | Very Good | Excellent |

1.3.4 STAGE 3 Evaluation on the 90/10 or 80/20 Preference Points System

Stage 3 entails the process of evaluation on price and B-BBEE based on the 80/20 or 90/10 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) 2017.

Certified copy of a **BBBEE certificate** issued by a **SANAS Accredited Agency** or a **Sworn Affidavit** in the prescribed format by the National Treasury or **Electronic Affidavit** Issued by **CIPC for EMEs and QSEs**. Service Providers that fail to submit BEEE credentials shall **NOT** be allocated preference points in line with the PPPF-Act regulations of 2017.

THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20

or

90/10

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

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

| B-BBEE Status Level of Contributor | Number of points (90/10 system) | Number of points (80/20 system) |
|------------------------------------|---------------------------------|---------------------------------|
| 1 | 10 | 20 |
| 2 | 9 | 18 |
| 3 | 6 | 14 |
| 4 | 5 | 12 |
| 5 | 4 | 8 |
| 6 | 3 | 6 |
| 7 | 2 | 4 |
| 8 | 1 | 2 |
| Non-compliant contributor | 0 | 0 |

2. TENDER DETAILS

The returnable documents shall be submitted in the sequence specified under the Returnable Documents Schedule (section 2.2).

2.1 – List of Compulsory Documents to be submitted with the tender

“Compulsory documents” shall be submitted by the bidders. If any of the below documentation is not supplied will lead to the immediate disqualification of the bidder. Certified copies of documents shall be submitted in original and not older than 3 months from the advertisement date.

| | |
|---|---|
| 1 | Invitation to Bid (SBD 1) |
| 2 | Declaration of Interest (SBD 4) |
| 3 | Preference points claim form in terms of the Preferential Procurement Regulations 2017 (SBD 6.1) |
| 4 | Copy of Company Registration Documents. <ul style="list-style-type: none"> If a joint venture, consortium or other unincorporated grouping of two or more parties (“joint venture”), each company must submit its Company Registration Documents. Only South African registered entities will be considered. |
| 5 | Attendance to the compulsory briefing meeting and completion of the attendance register with the Companies details and contact person. |
| 6 | Signed Detailed Financial Proposal <p>The compulsory detailed financial proposal shall be submitted by the bidders in the format that have been specified in the returnable scheduled below. Failure to submit the financial returnable document will lead to disqualification.</p> |

2.1: Invitation to Bid (SDB 1)

YOU ARE HEREBY INVITED TO BID FOR: PROCUREMENT OF THE MODERN TECHNOLOGY SOLUTION FOR THE INDEPENDENT DEVELOPMENT TRUST (IDT) ELECTRONIC PROGRAMME AND PROJECT MANAGEMENT INFORMATION SYSTEMS
(e-PPMIS)

BID NUMBER: IDT-NAT-EPPMIS-2022

CLOSING DATE: 12 December 2022

CLOSING TIME: 12:00

DESCRIPTION: **PROCUREMENT OF THE MODERN TECHNOLOGY SOLUTION FOR THE INDEPENDENT DEVELOPMENT TRUST (IDT) ELECTRONIC PROGRAMME AND PROJECT MANAGEMENT INFORMATION SYSTEMS**

The successful bidder will be required to fill in and sign a written Contract Form

BID DOCUMENTS MAY BE POSTED TO: N/A

OR

DEPOSITED IN THE BID BOX SITUATED AT: **The IDT Tender Box at the Independent Development Trust, Cnr Oberon & Sprite Street, Faerie Glen, Pretoria**

Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.

The bid box is open from 8:30 to 17:00, 5 days a week, Monday to Friday on normal working days

THIS BID IS SUBJECT TO THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT

THE FOLLOWING PARTICULARS MUST BE FURNISHED
(FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED)

NAME OF BIDDER

.....

POSTAL ADDRESS

.....

STREET ADDRESS

.....

TELEPHONE NUMBER

CODE.....NUMBER.....

CELLPHONE NUMBER

.....

EMAIL ADDRESS

.....

FACSIMILE NUMBER

CODENUMBER.....

VAT REGISTRATION NUMBER

.....

HAS A COPY OF A TAX CLEARANCE CERTIFICATE **WITH A TAX COMPLIANT PIN** BEEN SUBMITTED?

YES / NO

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS/SERVICES OFFERED BY YOU?

YES /NO

(IF YES ENCLOSE PROOF)

ARE YOU SUBMITTING THIS TENDER BID AS A JOINT VENTURE WITH ANOTHER COMPANY?

YES /NO

IF YES, PLEASE PROVIDE NAME OF THE OTHER JOINT VENTURE

SIGNATURE OF BIDDER

DATE.....

CAPACITY UNDER WHICH THIS BID IS SIGNED

TOTAL BID PRICE

TOTAL NUMBER OF ITEMS OFFERED

2.2: Declaration of Interest (SBD 4)

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,
- b) 1999 (Act No. 1 of 1999);
- c) any municipality or municipal entity;
- d) provincial legislature;
- e) national Assembly or the national Council of provinces; or
- f) Parliament.

2.7 Are you or any person connected with the bidder presently employed by the state?

Please tick applicable

| | |
|-----|----|
| 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 **YES / NO** shareholders / members or their spouses conduct business with the state in the previous twelve months?

2.8.1 If so, furnish particulars:

.....

.....

.....

2.9 Do you, or any person connected with the bidder, have **YES / No** 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?

2.9.1 If so, furnish.

.....

.....

.....

2.10 Are you, or any person connected with the bidder, **YES / NO** 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?

2.10.1 If so, furnish.

.....

.....

.....

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

2.11.1 If so, furnish particulars:

.....

.....

.....

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.....

2.2: Preference Points Claim Form in Terms of the Preferential Procurement Regulations 2017 (SBD 6.1)

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

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

a) The value of this bid is estimated to exceed/not exceed R50 000 000 (all applicable taxes included) and therefore the preference point system shall be applicable; or

b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.2 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.3 The maximum points for this bid are allocated as follows:

| | POINTS |
|---|--------|
| PRICE | |
| B-BBEE STATUS LEVEL OF CONTRIBUTOR | |
| Total points for Price and B-BBEE must not exceed | 100 |

1.4 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.

- 1.5 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 bidder 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 OR 90/10 PREFERENCE POINT SYSTEMS

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

80/20

or

90/10

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where

P_s = Points scored for price of bid under consideration

P_t = Price of bid under consideration

P_{\min} = Price of lowest acceptable bid

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

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

| B-BBEE Status Level of Contributor | Number of points (90/10 system) | Number of points (80/20 system) |
|------------------------------------|---------------------------------|---------------------------------|
| 1 | 10 | 20 |
| 2 | 9 | 18 |
| 3 | 6 | 14 |
| 4 | 5 | 12 |
| 5 | 4 | 8 |
| 6 | 3 | 6 |
| 7 | 2 | 4 |
| 8 | 1 | 2 |
| Non-compliant contributor | 0 | 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 10 or 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 | | NO | |
|-----|--|----|--|

7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.....%

ii) The name of the sub-contractor.....

iii) The B-BBEE status level of the sub-contractor.....

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

(Tick applicable box)

| | | | |
|-----|--|----|--|
| YES | | NO | |
|-----|--|----|--|

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

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

2.

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

DATE:

1. IDT's Reservation of Rights

- i. IDT reserves the right to subject Bidders and their facilities to assessment as part of the evaluation process or as a condition to contract award.
- ii. Consequent to the evaluation of Bidder's proposals, IDT reserves the right, with the permission of the IDT Board or the relevant delegated authority, to enter into negotiations with one or more of the preferred Bidders (as determined by IDT following evaluation of the tender proposals) for the whole or part of the services.
- iii. In addition, IDT may utilise the information received from the Bidder's responses to this tender for the purposes of undertaking any future procurement for other projects. Such procurement may be undertaken through negotiation with one or more parties (which may include the successful Bidder and/or any one or more Bidders who submit a tender in response to this enquiry) or any other procurement strategy.
- iv. IDT reserves the right to cancel or withdraw this tender following the National Treasury regulations.
- v. IDT reserves the right to undertake site visit to current/previous clients that use/used their existing proposed Electronic Programme / Project Information Management System. It is expected from the bidders to inform their user clients of potential site visit.

To be submitted for Costing Breakdown

| | |
|--------------------------------|--|
| NAME OF SYSTEM PROPOSED | |
|--------------------------------|--|

Bidders are required to provide a detailed financial proposal as per table below based on the scope of work specified. Failure to submit the detailed financial proposal for the project will lead to disqualification.

| ITEM DESCRIPTION | TIMELINES | COST |
|--|-----------|------|
| 1. PROJECT INITIATION (KICK-OFF) | | |
| 2. PLANNING | | |
| 3. SYSTEM ARCHITECTURE MAPPING AND DESIGN | | |
| 3.1 Programme and Project Management | | |
| 3.2 Engineering Management | | |
| 3.3 GIS (Spatial Management) | | |
| 3.4 Dashboards | | |
| 3.5 Electronic Facilities Management | | |
| 3.6 Performance Information Management | | |
| 3.7 Contract Management | | |
| 3.8 Monitoring and Evaluation Systems | | |
| 3.9 Knowledge Management Systems | | |
| 3.10 Social Facilitation Systems | | |
| 3.11 Suppliers Window | | |
| 3.12 Mobile Application Development | | |
| 3.13 Encryption Technology Solutions | | |
| 3.14 Automated Workflows | | |
| 3.15 Electronic Signatures | | |
| 3.16 Documentation and Records Management | | |
| 3.17 Electronic Form Builder | | |
| 3.18 Reports | | |
| 4. WEB APPLICATION / UI DEVELOPMENT / CONFIGURATION TO PRODUCTION | | |
| 4.1 Programme and Project Management | | |
| 4.2 Engineering Management | | |
| 4.3 GIS (Spatial Management) | | |
| 4.4 Dashboards | | |
| 4.5 Electronic Facilities Management | | |
| 4.6 Performance Information Management | | |
| 4.7 Contract Management | | |
| 4.8 Monitoring and Evaluation Systems | | |
| 4.9 Knowledge Management Systems | | |
| 4.10 Social Facilitation Systems | | |
| 4.11 Suppliers Window | | |

| ITEM DESCRIPTION | TIMELINES | COST |
|--|--------------------|------|
| 4.12 Mobile Application Development | | |
| 4.13 Encryption Technology Solutions | | |
| 4.14 Automated Workflows | | |
| 4.15 Electronic Signatures | | |
| 4.16 Documentation and Records Management | | |
| 4.17 Electronic Form Builder | | |
| 4.18 Reports | | |
| 5. TESTING TO PRODUCTION | | |
| 6. SKILLS TRANSFER | | |
| 7. MANUAL DEVELOPMENT (Static and Videos) | | |
| 8. TRAINING | | |
| 9. LICENSING (400 USERS) (If Applicable) | | |
| 9.1 Year 1 | | |
| 9.2 Year 2 | | |
| 9.3 Year 3 | | |
| 9.4 Year 4 | | |
| 10. SYSTEM MAINTENANCE AND SUPPORT | | |
| 10.1 Year 1 | | |
| 10.2 Year 2 | | |
| 10.3 Year 3 | | |
| 11. DISBURSEMENTS | | |
| TOTAL | | |
| | VAT | |
| | GRAND TOTAL | |

Any engagement with consultants, the bidders are requested to take note of the following remunerated rates;

- Determined in the "Guideline for Fees", issued by the South African Institute of Chartered Accountants (SAICA); or
- 6.8.2 Set out in the "Guides on Hourly Fee Rates for Consultants: by the Department of Public Service and Administration (DPSA); or
- 6.8.3 Prescribed by the body – regulating the profession of the consultant.

Signed

Date

Name

Bidder

Company Experience and Track Record

The Bidder should provide details of their relevant experience on similar scale projects implemented in the past 5 years. In support bidders are to complete the "Project Experience" schedule below and attach thereto copies of Clients Reference Letter (refer to the Letter minimum requirements)

| PROJECT NAME | PROJECT DESCRIPTION | CLIENT NAME | COMPLETION DATE | PROJECT VALUE |
|--------------|---------------------|-------------|-----------------|---------------|
| A. | | | | |
| B. | | | | |
| C. | | | | |
| D. | | | | |
| E. | | | | |

Company List of Projects Completed

The Bidder should provide List of Projects completed in the last 5 years

| PROJECT NAME | PROJECT DESCRIPTION | CLIENT NAME | PROJECT START DATE | PROJECT END DATE |
|--------------|---------------------|-------------|--------------------|------------------|
| A. | | | | |
| B. | | | | |
| C. | | | | |
| D. | | | | |
| E. | | | | |
| F. | | | | |

The reference letters minimum requirements:

The Bidder shall provide client reference letter detailing the bidder performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference” should be issued by each of the respective Clients in the client letter heads. Failing to submit the information requested will result in losing points under the evaluation process.

The following information should be included in the Clients Reference Letter for each project:

- Project Name
- Project Scope
- Project Cost
- Project Duration
- Performance Evaluation of the bidders / Satisfactory Level by Client
(**Excellent, Good, Satisfactory, Not Satisfied**)
-Any other remarks considered necessary to assist in evaluation of the tenders

IDT as part of the evaluation process may undertake site visit to current/previous clients that use/used their existing proposed Electronic Project Management System Modules. It is expected from the bidders to inform their client/s of potential site visit.

2. CONDITIONS

2.1 System Conditions

- 2.1.1 The e-PPMIS must be hosted CLOUD BASED so that IDT personnel and the identified external parties can have access to the application,
- 2.1.2 The system must have a mobile friendly application (**myIDT**) with some system functionality embedded, for both Android and IOS Applications
- 2.1.3 The system must be fully integrated with all the current IDT Systems, including Microsoft Great Plains Dynamics and Sage VIP.

2.2 Contract Conditions

- 2.2.1 The appointed Services Provider will enter into a Services Level Agreement (SLA) with the employer (IDT)
- 2.2.2 The terms of the contract that will be signed between the parties have been stipulated under **SECTION “Service Level Agreement”**
- 2.2.3 All contractual relationships must ensure that the programme / project data is owned by the IDT, unless ownership is transferred to the Client through the relevant legislative requirements applicable

3. ELECTRONIC PROGRAMME AND PROJECT MANAGEMENT INFORMATION SYSTEMS (e-PPMIS)

3.1 Project Overview

Driven by the IDT Vision of being “A leading public sector developmental programme implementation management agency”, continuous improvement to institute best programme and project management practice in supporting various client’s department in the delivery of social and basic services infrastructure and related development objectives, is imperative.

In an effort to achieve efficiency and to meet the client demands, the IDT initiated a multiyear project named “Electronic Programme/Project Management System (e-PPMIS). The e-PPMIS focus is the improvement and integration of programme and project delivery management systems and processes.

A key deliverable of the e-PPMIS is the Programme and Project Management Processes which include a process mapping where was completed, indicating activities and sub-processes linked to specific role players including internal and external stakeholders. In addition, activities, stages and processes are linked to deliverables that is support either by a check list, a template or specific document to be electronically enable.

With the publication from National Treasury of the FIPDM in October 2019, framework that support the procurement and delivery process of infrastructure projects/programmes/portfolios in line with the IDMS, it become imperative that the alignment of the IDT Programme and Project Management Processes to the foresaid framework, standards and guidelines, to ensure compliances with the National Treasury requirements.

3.2 Objectives of the Project

The aim of the project is to produce and institutionalize an adequate electronic Programme and Project Management Systems to ensure management and delivery of integrated quality social infrastructure programmes on behalf of government.

The philosophy behind the project is to ensure Programme and Project Management best practice by applying the 10 knowledge areas of the Project Management Body of Knowledge (PMBOK) and the Built Environment Professionals governance, while complying with National Treasury Regulations guideline and standards such as the FIPDM and the IDMS Management Framework for the implementation of infrastructure projects in South Africa Public Sector which in fact, is aligned with the CIDB Gateway System.

The second objective of the project is to implement modern technologies in the Programme and Project Management Environment within IDT. This will enhance efficiency and assist the organisation to deliver programme and projects on time, within budget and good quality.

3.3 Scope of the Project

The scope of the project is to acquire an electronic Programme and Project Management System that can be customised to the IDT project management environment. The system should include automated workflows in line with IDT programme and project management processes as well as automation of process templates and checklists. It should be able to shorten the IDT's project delivery periods by eliminating inefficiencies and creating a robust electronic "paper-trail" that will stand as acceptable evidence to the scrutiny of an audit.

The system should be user friendly and allow for automatic capturing of information by all the relevant stakeholders at project level during execution, avoiding the need for a duplication of processes in the collection and capture of information. This can be delivered in the form of Mobile Applications to capture and report data on project sites.

The system should integrate with the National Treasury Central Supplier Database (CSD), The system should not include the financial and project accounting functionalities but shall interface or integrate with the current existing IDT financial system, which is Microsoft Dynamics Great Plains for Programme and Project Cost Management.

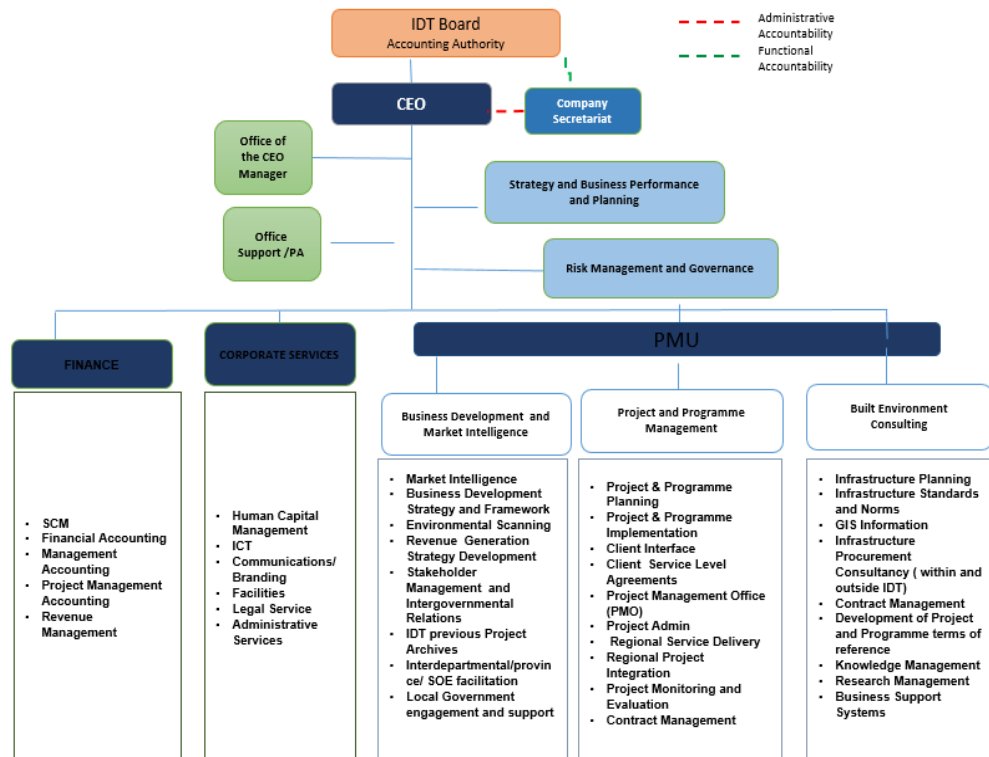
4. OVERVIEW OF IDT

4.1 Who is IDT?

The IDT is a Schedule 2 Major Public Entity in terms of the PFMA. Reports to Parliament through its Executive Authority, the Minister of Public Works and Infrastructure. Mandated to act as a state implementing agency focusing on social infrastructure programme and project management. Works with all spheres of government through client-specific service level agreements.

4.2 Organisational Structure

The high-level enterprise-wide governance structure of the IDT is represented by the organogram in Figure 4.1. The Programme Management Services Unit (PMSU) is the IDT's arm through which the bulk of the programmes are implemented on behalf of the clients. The PMSU is the "custodian of a substantial part of the IDT's core business". The Programme and Project Management System is required by the PMSU.



The structure presented in Figure1 reflects top management structure positions as at 31 March 2022

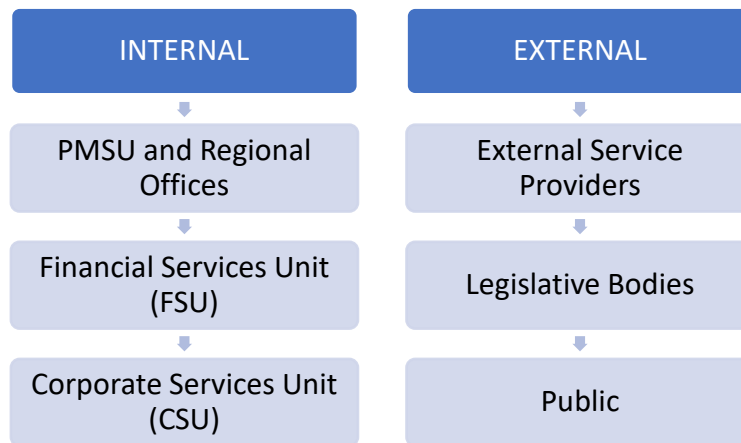
4.3 Governance Structure

The IDT enjoys a National footprint though out the country in its nine regions (Provinces). With one regional office in each of the nine provinces major cities. The e-PPMIS will be used to:

- Support the IDT programme and programme personnel in the execution of their work,
- Collect the information that is required to report and support management and stakeholder requirements.

4.4 e-PPMIS Stakeholders

Any group or individual affected by or having potential influence on the e-PPMIS is a stakeholder and the following key internal and external stakeholder groups were identified for the e-PPMIS:



| | | |
|-----------------|-----------------------------------|---|
| INTERNAL | PMSU | All PMSU Personnel |
| | FSU | Supply Chain Management |
| | | Project Accounting |
| | | Financial Management |
| | CSU | Legal Services |
| | | ICT |
| | | Human Resource |
| | | Internal Audit |
| | MANAGEMENT | Board / Board Committees / CEO |
| | EXTERNAL SERVICE PROVIDERS | Contractors |
| | | Project Managers |
| | | Professional Service Providers (e.g. Principal Agents, Architecture, Engineers, QSs etc.) |
| | | Service Providers |

| | | |
|-----------------|---------------------------|--|
| EXTERNAL | LEGISLATIVE BODIES | SA Parliament and Relevant Parliament Committees |
| | | Department of Public Works and Infrastructure |
| | | National Treasury |
| | | Auditor-General |
| | | Client Departments |
| | | Municipalities |
| | PUBLIC | Any interested citizen within the republic |

4.5 e-PPMIS User Roles

The users are people that will utilise the e-PPMIS to deliver the relevant programmes and projects, and table below provides a list of the potential e-PPMIS users.

| User Role | Role Description | Reports to |
|-----------------------------------|---|---|
| Executives / CEO / CFO | Overall IDT management. | IDT Board |
| Executive Manager: PMSU | Overall management of IDT's regional operations. | Executive |
| General Manager: PMSU | Coordinates portfolios and ensures delivery on national programmes. | Executive |
| Regional General Manager | Manages the IDT's regional office ensures delivery on regional programmes or a regional portion of a national programme. | General Manager: Regional Operations |
| Portfolio Manager | Manages one or more portfolios (group of programmes) for the Clients. Can be at Head Office (national) or regional level. | General Manager: Programmes or Regional General Manager |
| Originators | Assess proposed programmes and prepare documentation before the IDT is appointed for a programme. | Varies. |
| National Programme Manager | Manages one or more national programmes for the IDT. | Portfolio Manager |
| Regional Programme Manager | Manages one or more programmes in a region for the IDT <u>or</u> manages a regional portion of a national programme. | Regional General Manager / Portfolio Manager |

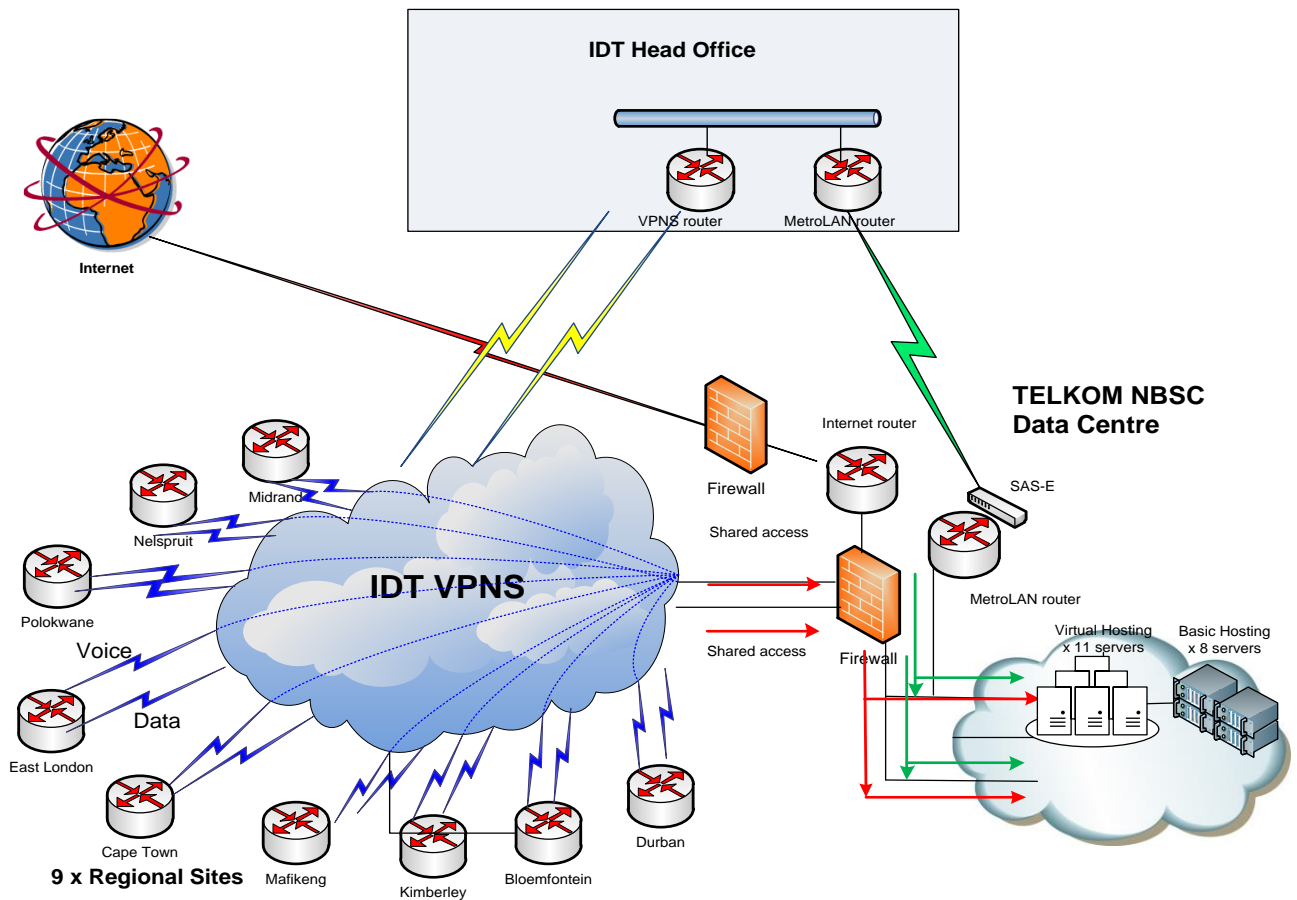
| User Role | Role Description | Reports to |
|---|--|--|
| Programme Implementation Manager – Technical | Manage infrastructure programmes and project planning, implementation and delivery. | Regional Programme Manager |
| Programme Implementation Manager – Social | Manage social development and community upliftment programmes, implementation and delivery. | Regional Programme Manager |
| Programme Implementation Administrator | Provide administration support and co-ordinate the activities of the Programme Implementation Managers and to monitor the programme budget and other administrative related activities aligned to programme and projects | Regional Programme Manager |
| Information Management Officer | Provide Information Management in Regional Offices | Regional General Manager |
| Support Units | All identified personnel in the all the support units linked to the programme and project management workflows (FSU, CSU, OCEO) | Relevant Executives in the Units |
| Principal Consultant | The professional appointed by the IDT assigned responsibility for leading the professional team during the design stage. | Programme Implementation Manager |
| Consultant / Supplier | The party appointed by the IDT to provide a specific service such as infrastructure design or social service planning. | Programme Implementation Manager or Principal Consultant / Agent |
| Principal Agent | The professional appointed by the IDT assigned responsibility for leading the professional team during the construction stage and administering the construction contract (usually an architect). | Programme Implementation Manager |
| Contractor | The party appointed by the IDT to provide a specific service such as infrastructure construction or social service provision. | Programme Implementation Manager or Principal Agent |

| User Role | Role Description | Reports to |
|------------------------------|--|------------|
| External Stakeholders | All external stakeholder will have view access to the progress and updates of programmes and projects implemented as well as send enquiries where applicable | N/a |

4.6 IDT ICT Environment

The IDT ICT Technology is hosted in a Microsoft Environment. Below are the current systems within the organisation;

| | |
|---|---|
| ERP (Great Plains Microsoft Dynamics) | <ul style="list-style-type: none"> Project Accounting, Cashbooks, Accounts Payable, Purchasing and General Ledger |
| HR ERP | <ul style="list-style-type: none"> Sage VIP HR Module |
| In-House Development (to be decommissioned) | <ul style="list-style-type: none"> Purchase Requisition System Payment Requisition System Vendor Management System |
| Database Structure | <ul style="list-style-type: none"> Microsoft SQL |
| Client Server Environment | <ul style="list-style-type: none"> Client machines – Windows based Server Estate hoisted at Service Provider. Combination of physical and virtual Microsoft; Hyper V and Vmware Technologies |
| Network Infrastructure (refer to the diagram below) | <ul style="list-style-type: none"> LAN in each of our 10 offices (Cisco end-to end-technology) WAN (VPNS based on MPLS with Quality of Service) Infrastructure private Cloud hosted. Metro Ethernet between Head Office and the Data Centre. Link Speed varies between 1 -2 Mbit/s (IDT currently undertaking line upgrades in all regional offices and head office) |

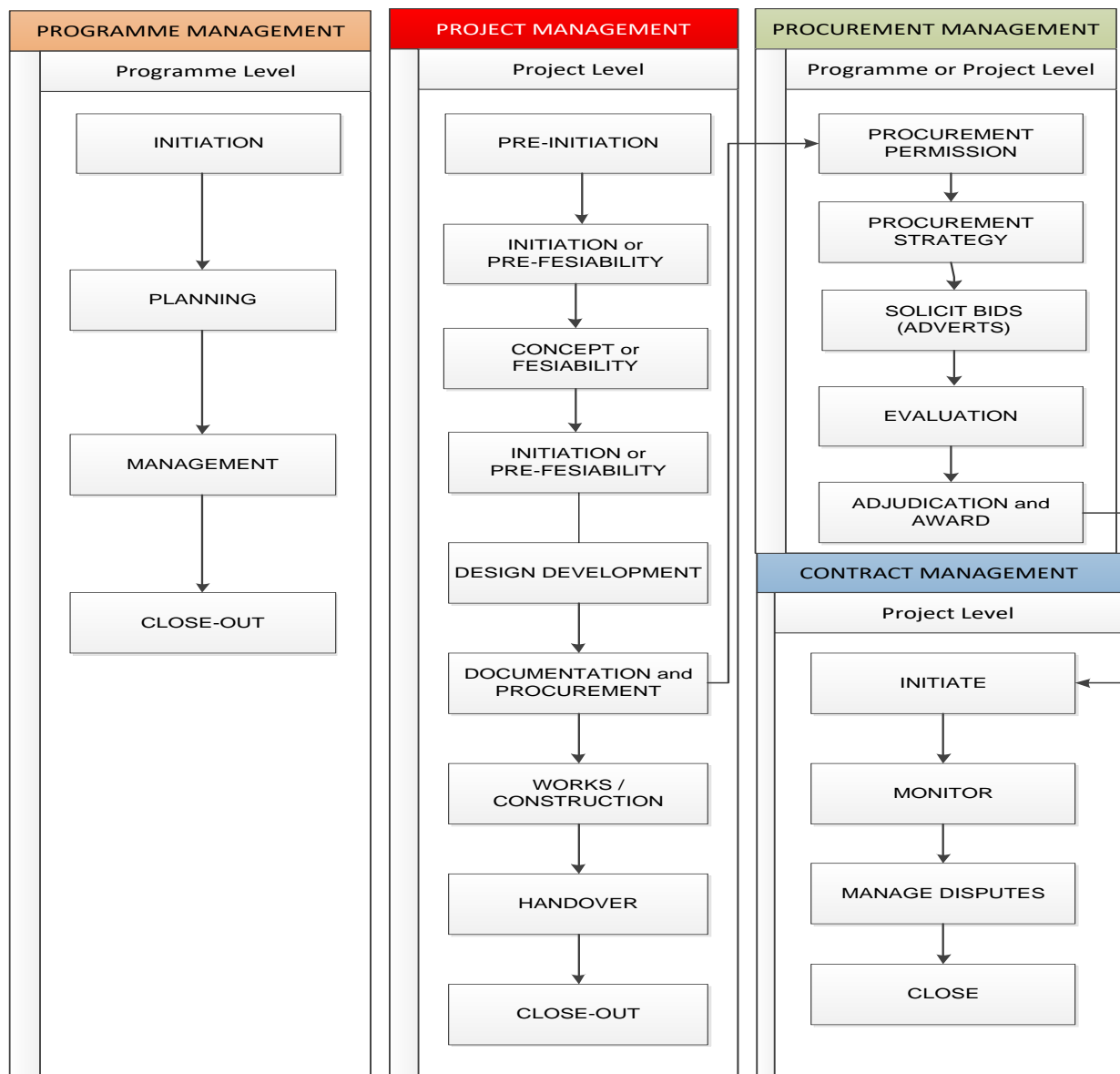


IDT Network Infrastructure

IDT is currently embarking on upgrade project of regional and head office connectivity where lines will be upgraded between 50 Mbps and 25 Mbps

5. IDT PROGRAMME AND PROJECT MANAGEMENT PROCESSES

The IDT's high-level Programme and Project Management process (Level 1) is presented below. The IDT had broken down (decomposed) each of these processes/stages to give additional detail with respect to the sub-processes and activities as well as the flow of information and roles and responsibilities. Each stage objective should be captured in the e-PPMIS and corresponding template to be developed, inclusive of the workflow approval process.



| Level | Stage Name | Stage / Gate No. | Stage Objective |
|-----------------------------|--|--------------------|---|
| PROGRAMME MANAGEMENT | Client Approved IAMP | PF-S1 | Upload clients approved Infrastructure Asst Management Plan |
| | Client Programme Management Documents | PR-S1 | Upload or capture the following documents / information <ul style="list-style-type: none"> • Procurement Strategy • Programme Management Plan • Programme Charter |
| | Programme Initiation | PR-S1-A PR-S1-B | Upload or capture the following documents <ul style="list-style-type: none"> • Approved New Business Form • Instruction Letter from client • IDT Programme Charter • Signed -off Service Level Agreement (SDA) |
| | Programme Planning | PR-S2 PR-CP-2 | Upload or capture the following documents / information <ul style="list-style-type: none"> • Approved Programme Implementation Plan (IPI) • Programme Schedule • Programme Cashflow • Programme Bank Account • Programme GP (Great Plains) Registration |
| | Programme Management | PR-S3 | Upload or capture the following documents / information <ul style="list-style-type: none"> • Programme Progress Reports • Programme Financial Reconciliations • Updated Programme Cashflow • Updated Programme Schedule • Updated Programme Risk • Manage Contractual Matters |
| | Programme Close-out | PR-S4 | Upload or capture the following documents / information <ul style="list-style-type: none"> • Programme Close-out Reports • Updated Programme Financial Reconciliations • Bank Account closure confirmation • Programme Handover Checklist • Client acknowledgement of Programme Handover Documents |
| | Project Pre-Initiation | PJ-0 | Upload or capture the following documents / information |
| PROJECT MANAGEMENT | | | |

| Level | Stage Name | Stage / Gate No. | Stage Objective |
|-------|--|---|--|
| | | | <ul style="list-style-type: none"> Client Instruction confirming Project Budget Allocation per Financial Year Letter of Appointment – IDT Project Manager Site Clearance Certificate (if applicable) Project Charter |
| | Project Initiation (Pre-Feasibility) | PJ-S1-A PJ-S1-B PJ-S1-C PJ-CP-1 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> Approved Project Initiation Report Approved Project Pre-Feasibility Report (mega projects) Updated Project Charter Project Charter Approved Project Execution Plan (PEP) |
| | Project Concept (Feasibility) | PJ-S2-A PJ-S2-B PJ-CP-B | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> Develop Project Concept Report Develop Project Feasibility Report (mega projects) Approved Feasibility Report (mega projects) |
| | Project Design Development | PJ-S3-A PJ-CP3-A PJ-CP3-B PJ-CP3-C | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> Drawing Checklist per Project Discipline Approved Drawing sign-off Minutes and Attendance Registers for Design Meetings Municipal Drawing approval DPWI Drawings Approval Client Acceptance Drawings |
| | Project Documentation and Procurement | PJ-S4-1 PJ-CP4-A | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> Construction and Procurement Documentation (Specifications) Project Health and Safety Requirement Construction Schedule – Preliminary Construction Costs and Projections- - Preliminary Client Approval for Project Documentation |

| Level | Stage Name | Stage / Gate No. | Stage Objective |
|-------|-------------------------------------|------------------|---|
| | | | <ul style="list-style-type: none"> • Submit Construction Approval by Dept. of Labour • Approved Construction Permit |
| | Project Works / Construction | PJ-S5 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Site Handover Certificate • Minutes and Attendance Register of site handover certificates • Contractor Health and Safety Plan – approved by H&S Consultant • Subcontractor List • Construction Issue Log • Updated Construction Schedule • Updated Construction Cashflow and Projections • Construction Environmental Management Plan • Progress Reports • Socio-Economic / Empowerment Report • Monthly site-meetings (attendance registers and minutes) • Monthly Technical meetings (attendance registers and minutes) • Interim Payments Reports • Professional Service Provider Payment Report • Manage Change Request (VO / EOT / SCOPE) • Site Inspection Reports • Health and Safety Audit Inspection Report • Professional site inspection monitoring report • Facility Users Training Plan • Training Attendance Registers • Issuing of Practical Completion Certificate • Issuing of Works Completion Certificate • Handover of Facility Keys |
| | Project Handover | PJ-S6 PJ-CP6 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Municipality Occupation Certificate • As Built Drawings |

| Level | Stage Name | Stage / Gate No. | Stage Objective |
|-------------------------------|-------------------------------|--|---|
| | | | <ul style="list-style-type: none"> • Building Certificates • Asset Register Data • Equipment Maintenance Plan • M & O Manuals • Handover Documentation Checklist • Acknowledgement of Handover documentation report |
| | Project Close-out | PJ-S1-A PJ-S1-B PJ-CP1-A PJ-CP1-B PJ-CP1-C | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Project Final Completion List (indicating defects) • Final Completion Report • Latent Defects Report • Project Close-out Report • Final Completion Certificate • Contractor Final Account • Contractor Final Payment Certificate • PSP Final Account • PSP Final Payment Certificate • Approved Close-out Report • Confirmation – closure of projects in IDT Systems |
| PROCUREMENT MANAGEMENT | Procurement Permission | PG-S1 PG-S2 PG-S3 PG-S4 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Scope of work for procurement • Procurement Financial Value • Budget Confirmation • Procurement Approval • Procurement Strategy and Permission • Pricing Strategy • Procurement Procedure • Bid Specification Documentation (minutes / attendance registers/ appointments etc) • Cashflow based on anticipated Contractual Obligation • Control Measures for Payments • Procurement Strategy and Permission Approval |

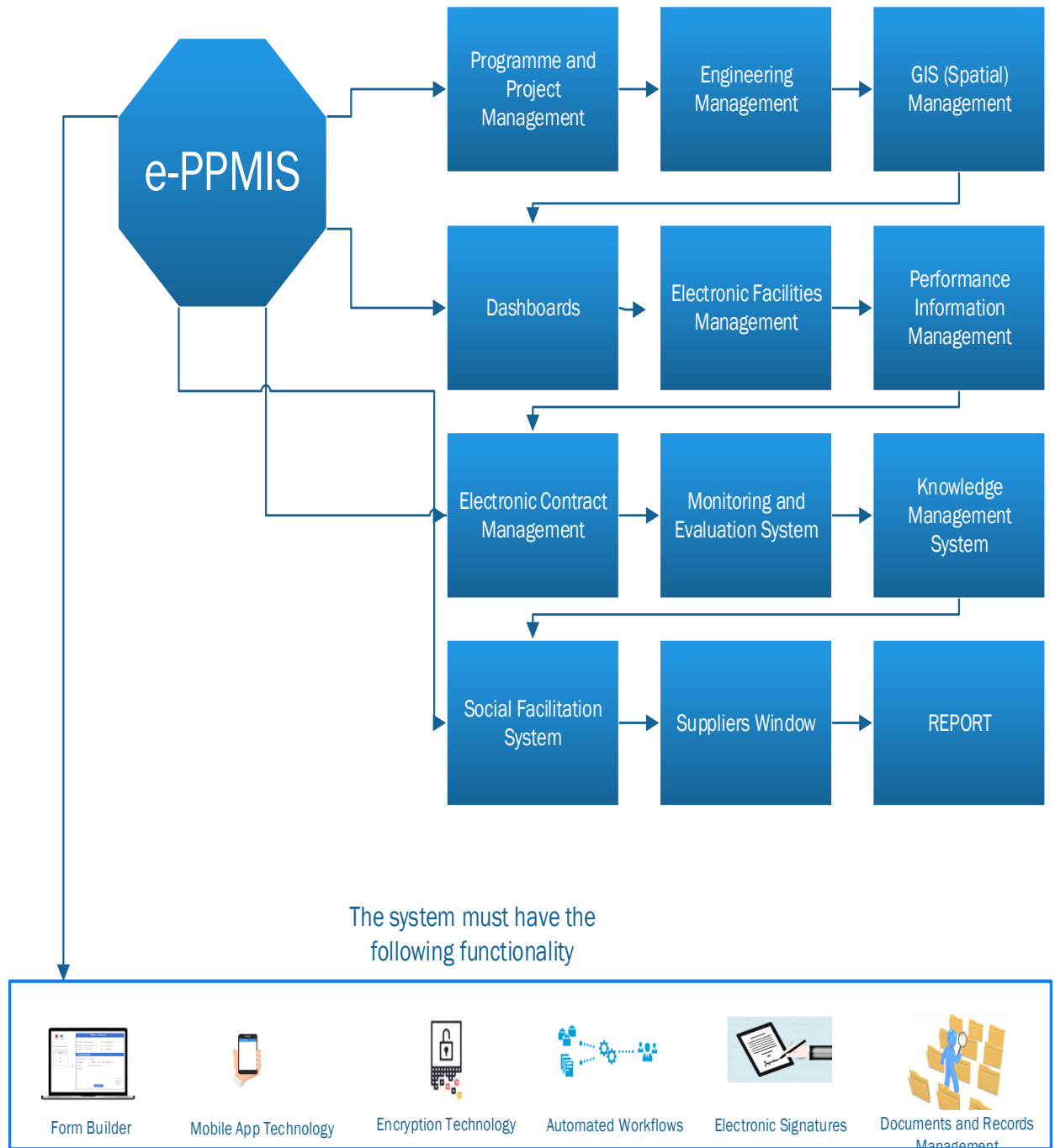
| Level | Stage Name | Stage / Gate No. | Stage Objective |
|----------------------------|--|------------------|---|
| | Solicit Tenders | PG-S5 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Invitation to Tenders • Receive of Tenders • Closure of Tenders • Records of Tender Offers |
| | Bid Evaluation | PG-S6 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Records of all tenders received • Tender Evaluation Report • Risk Analysis Report • Records of Tender Offers |
| | Bid Adjudication | PJ-S7 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Tender Adjudication Report • Notification – Successful and Unsuccessful Tenders • Request for Additional Budget (if winning bidder price is above estimated budget) • Records of Tender Offers • Contract Award Data • Notification to Legal Issued |
| CONTRACT MANAGEMENT | Contract Initiation (Documentation) | CM-S1 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Contract Documentation • Letter of Appointment |
| | Contract Management | CM-S2 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Fully signed Contract • Variation Order and Extension of Time Reports • Contract Commitment Report • Supplier Performance Report • Contract Adjustments |

| Level | Stage Name | Stage / Gate No. | Stage Objective |
|-------|-------------------------|------------------|---|
| | | | |
| | Contract Closure | CM-S3 | Upload / capture / Approve the following documents / information <ul style="list-style-type: none"> • Updated Contract Commitment Report • Updated Supplier Performance Report • Updated Variation Order and Extension of Time Reports • Contract Close-out Checklist |

As indicated above, the Programme and Project Management process include a process mapping linked to specific role players including internal and external stakeholders. In addition, activities, stages and processes are linked to deliverables that is supported either by a check list, a template or specific document to be electronically enable inclusive of automated workflows.

The system (e-PPMIS) must have an integration capability across applications with the following minimum requirements for each module

- Mobile App Technology (both Android and IOS)
- Encryption Technology
- Automated Workflows
- Electronic Signatures
- Electronic Document and Records Management



e-PPMIS Applications (Application Architecture DEVOPS and Security Requirements)

The entire platform should be built on one centralised app configuration module, which should consist of the following capabilities:

1. Flexible key/value representations and mappings,
2. Dedicated UI for management of all centralized configuration,
3. Encryption at rest and in transit of sensitive information,

3. automation of all application,
4. Form Builder, and
5. Mobile Application

configuration management across each and every module and /or service within the e-PPMIS platform within one centralised area, ensuring consistency across all development, testing and production environments.

6. e-PPMIS REPORTING STRUCTURE

The reporting structure of e-PPMIS is outlined in the figure below with the lowest source of information to the highest level of decision making in the organisation.

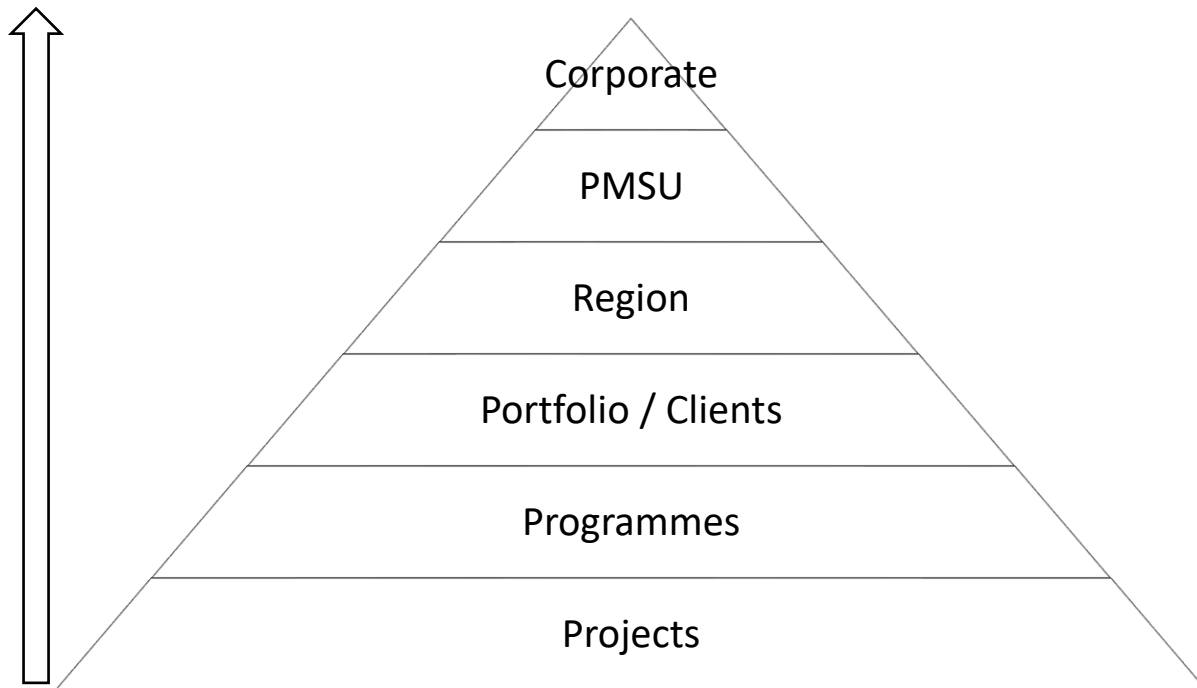


Table 1.5 Current Programme and Project Population within the organisation

| LEVEL | NUMBERS | SOURCE |
|----------------------------|---|--|
| Projects | Unit is managing +- 2 000 projects on average in a financial year | <ul style="list-style-type: none"> • PSPs • Contractors • PIMs |
| Programmes | On average +- 200 Programmes | <ul style="list-style-type: none"> • PIMs • PMs |
| Portfolio / Clients | On average 15-30 Portfolios | <ul style="list-style-type: none"> • PIMs • PMs |
| Region | 9 Regions | <ul style="list-style-type: none"> • PMs • Portfolio Managers • Regional General Managers |
| PMSU | One Unit (Combination of 9 regions and head office programmes unit) | <ul style="list-style-type: none"> • Regional General Managers • GM PMSU • Executive PMSU |
| Corporate | Entire IDT | <ul style="list-style-type: none"> • ALL Levels • CFO • CEO |

7. e-PPMIS KEY FUNCTIONAL REQUIREMENTS

The proposed e-PPMIS is expected to meet the minimum requirements outlined in the table below. Bidders are encouraged to propose a solution that not only meets the minimum functional requirements, but also go beyond to offer innovative solutions in the market.

| APPLICATION | MINIMUM REQUIREMENTS |
|--|---|
| 1. Programme and Project Management | <p>The programme and project management application should have the following minimum functionality;</p> <ul style="list-style-type: none"> • Programme and Project Management solution aligned to IDMS and FIPDM • Customised to IDT Programme and Project Management workflows outlined above • Application of the PIMBOK 10 Knowledge Areas • Automated workflows for the IDT programme and Project Management with stage gate and checklist approval by relevant delegated officials (process outline above briefly) • Notification Alerts for Activities • Programme and Project Performance with early warning capability • Project Site Reporting, including site meetings, technical meetings, Issues, Actions and Risks tracking • Project Team collaboration • Updating of Project Status • Developing Programme and Project Cashflow • Capturing of Programme and Project Allocations • Integrate with Microsoft Great Plains Dynamics |
| 2. Engineering Management | <p>The Engineering management application should have the following minimum functionality;</p> <ul style="list-style-type: none"> • Quality and Inspections of Drawings • Drawing Annotations for comments • Drawing Approval Process automated • Traceability and Change Management |

Electronic Programme / Project Management System

| APPLICATION | MINIMUM REQUIREMENTS |
|------------------------------------|---|
| | <ul style="list-style-type: none"> • View or Read data from Engineering software such as CAD, WinQS etc • Client, PSPs and Contractor Collaboration |
| 3. GIS (Spatial Management) | <p>The GIS application should have the following minimum functionality and based on ESRI suite of software applications;</p> <ul style="list-style-type: none"> • Capturing of Project Data on site • Built-in forms for data capturing (to be designed) • Mapping of Programmes and Projects across the country • Update of Project Status • Capturing of Project Images • Viewing Programme and Project Performance • Interactive Application for viewing and querying of Programme and Project Data • Map view of Programme and Projects • Mobile responsive with all available native mobile features such as Location / Tracking services, QR Codes and Camera • Dashboard application to interface with External Dashboards • The application should have a Form Engine functionality with capability to generate front-end and no code for data capturing purposes • The Form Engine should also consist of a Workflow defined as per the Programme and Project Management Processes |
| 4. Dashboards | <p>The Dashboard application should have the following minimum functionality;</p> |
| 4.1 Internal | <ul style="list-style-type: none"> • Dashboard view for Programme and Project Performance (Cost and Time performance) • Risks, Issues and Action Items Tracking • Flagging of non-performing projects and programmes • Programme and Project Life Cycle view • Programme and Project Status • Early Warnings • Social Programmes Dashboards • Procurement Dashboards |

Electronic Programme / Project Management System

| APPLICATION | MINIMUM REQUIREMENTS |
|--|--|
| 4.2 External | <ul style="list-style-type: none"> Viewing application for client departments Viewing Programme and Project Performance Programme and Project Status GIS Dashboard Integration The Dashboard should consist of machine learning and AI capabilities to train, deploy and manage low-code machine learning modules. |
| 5. Electronic Facilities Management | <p>The Facilities application should have the following minimum functionality;</p> <ul style="list-style-type: none"> Electronic Facility Assets Register Asset Monitoring Asset maintenance notifications and early warning functionality for planned maintenance Overall facility Asset Management Facility Images GIS Dashboard Integration |
| 6. Performance Information Management | <p>The Performance Information Management application should have the following minimum functionality;</p> <ul style="list-style-type: none"> Developed or Configured to the National Treasury Framework for Managing Programme Performance Information Automated reporting for Organisation Annual Performance Plans Tracking of Regional and Unit Performance against the Annual Performance Targets Multi-level reporting (Project>Programme>Region>UNIT>MULTI-UNIT>Corporate) Performance Information Dashboards with early warning capability Uploading of corresponding Portfolio of Evidence for each indicator achieved |
| 7. Contract Management | <p>The Contract Management application should have the following minimum functionality;</p> <ul style="list-style-type: none"> Contract Initiation Contract Management Change Request Management Litigation Management Supplier Performance Supplier Default Notifications CSD Integration Contract Search and Retrieval Contract Depository and Catalogues Early warnings for non-performing service providers and expiry of contracts |

Electronic Programme / Project Management System

| APPLICATION | MINIMUM REQUIREMENTS |
|---|---|
| 8. Monitoring and Evaluation Systems | <p>The Monitoring and Evaluation application should have the following minimum functionality;</p> <ul style="list-style-type: none"> • M & E Planning • Multi-level Reporting (Project>Programme>Region>PMSU>Corporate) • M & E Dashboards and Reports |
| 9. Knowledge Management Systems | <p>The Knowledge Management application should have the following minimum functionality;</p> <ul style="list-style-type: none"> • Lesson Learned Database • Linked to Monitoring and Evaluation Reporting • Best Practice Knowledge Bank |
| 10. Social Facilitation Systems | <p>The Social Facilitation application should have the following minimum functionality;</p> <ul style="list-style-type: none"> • Development of Social Facilitation Plans • Stakeholder Engagement Reports • Social Facilitation Reports • Social Facilitation Dashboards |
| 11. Suppliers Window | <p>The Supplier Window application should have the following minimum functionality;</p> <ul style="list-style-type: none"> • Supplier Upload Documents • Submission of Invoices and Invoice Tracking Capability linked to Great Plains • Supplier Notification of expired documentations such as BBBEE, Tax etc. • Collaboration with Internal Staff • Supplier Performance view (linked to Contract Management) |
| 12. Mobile Application Development | <p>The Mobile application should have the following minimum functionality;</p> <ul style="list-style-type: none"> • Use of customised mobile Application to access and capture certain features of e-PPMIS • Capturing site information to be identified within the IDT programme and project management processes • Collaboration between IDT and Suppliers with Notifications • Viewing of Bids / Tenders • Receiving Notifications for Bids • The application should have a Form Engine functionality with capability to generate front-end and no code for data capturing purposes • The Form Engine should also consist of a Workflow defined as per the Programme and Project Management Processes |

Electronic Programme / Project Management System

| APPLICATION | MINIMUM REQUIREMENTS |
|---|--|
| 13. Encryption Technology Solutions (CYBER SECURITY) | <p>Application of Modern Encryption Technology to be embedded within all Applications to safeguard the data transmitted</p> <ul style="list-style-type: none"> • Identity Verification for Operators • Cloud Based/private cloud Endpoint Security for Servers, endpoints, and cloud workloads • The Solution must consist of one platform solution to protect and offer superior visibility and enterprise-grade prevention, detection, and response across attack surface • The solution must Proactively prevent threats by extending endpoint visibility. • The solution must protect data and resources with application-level access control based on user identity and context such as device security posture, user behaviour and risk score • Cloud Security • Penetration Testing Reports |
| 14. Automated Workflows | <p>The Automated Workflow should have the following minimum functionality;</p> <ul style="list-style-type: none"> • Automated workflow capability to be applied in all Applications • Escalation Capability for unfinished, due, overdue or neglected tasks |
| 15. Electronic Signatures | <p>Minimum Two-phase Authentication for application of signatures to documents (OTP)</p> <ul style="list-style-type: none"> • Cryptographic Digital Signature • Parallel, sequential and mixed routing • Approvers, Viewers and Signers • API integration • Digital Certificates • Time Stamping • Tamper Evident |
| 16. Documentation and Records Management | <p>The Documents and Records application should have the following minimum functionality;</p> <ul style="list-style-type: none"> • Electronic Document and Records Management to be applied in all application • Viewing and Retrieval of Documentation across all e-PPMIS applications • Electronic Referencing of Documents |

Electronic Programme / Project Management System

| APPLICATION | MINIMUM REQUIREMENTS |
|------------------------------------|--|
| | <ul style="list-style-type: none"> The documentation engine needs to consist of a template-driven administration functionality. The documentation/template driven module should consist of automation to ensure management all document content and processes. Should comprise of a communication and event driven engine The documentation engine should also be fully integrated with an authorised digital signature capability with workflow to allow approvers, viewers and singers Cryptographic and tamper evident |
| 17. Electronic Form Builder | <p>The Form Builder application should have the following minimum functionality;</p> <ul style="list-style-type: none"> Electronic Form Development with Automated Workflows Database Development based on multiple forms Design, Edit, Capture Functionality Mobile Forms |
| 18. Reports | <p>The Reports should have the following minimum functionality;</p> |
| 17.1 Internal | <ul style="list-style-type: none"> Standard Reports (Projects, Programmes, Portfolio, Clients, Region and Unit Levels) PMSU Report (structure to be provided) Custom Report Builder |
| 17.2 External | <ul style="list-style-type: none"> Standard Client Reports Custom Report Builder) |



INDEPENDENT DEVELOPMENT TRUST

STANDARD CONDITIONS OF TENDER

1 General

Actions

1. The Independent Development Trust, Independent Development Trust's Representative and each bidder submitting a tender shall act as stated in these Conditions of Tender and in a manner, which is fair, equitable, transparent, competitive and cost-effective.

The Conditions of Tender and the Tender Data shall not form part of any contract arising from this invitation to tender.

Communication

2. Each communication between the Independent Development Trust and a bidder shall be to or from Independent Development Trust's Representative only, and in a form that can be read, copied and recorded. Communication shall be in the English language. The Independent Development Trust takes no responsibility for non-receipt of communications from or by a bidder.

Independent Development Trust's rights to accept or reject any tender

3. The Independent Development Trust may accept or reject any variation, deviation, tender, or alternative tender, and may cancel the tender process and reject all tenders at any time prior to the formation of a contract. The Independent Development Trust or Independent Development Trust's Representative will not accept or incur any liability to a bidder for such cancellation and rejection but will give reasons for the action. The Independent Development Trust reserves the right to accept the whole of any part of any tender.
4. After the cancellation of the tender process or the rejection of all tenders the Independent Development Trust may abandon the proposed work and services, have it performed in any other manner, or re-issue a similar invitation to tender at any time.

2 Bidder's obligations

The bidder shall comply with the following obligations when submitting a tender and shall:

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|---|---|--|
| Eligibility | 1 | Submit a tender only if the bidder complies with the criteria stated in the Evaluation Criteria. |
| Cost of tendering | 2 | Accept that the Independent Development Trust will not compensate the bidder for any costs incurred in the preparation and submission of a tender. |
| Check documents | 3 | Check the tender documents on receipt, including pages within them, and notify the Independent Development Trust's Representative of any discrepancy or omissions. |
| Copyright of documents | 4 | Use and copy the documents provided by the Independent Development Trust only for the purpose of preparing and submitting a tender in response to this invitation. |
| Standardised specifications and other publications | 5 | Obtain, as necessary for submitting a tender, copies of the latest revision of standardised specifications and other publications, which are not attached but which are incorporated into the tender documents by reference. |
| Acknowledge receipt | 6 | Preferably complete the Receipt of invitation to submit a tender form attached to the Invitation and return it within five days of receipt of the invitation. |
| | 7 | Acknowledge receipt of Addenda to the tender documents, which Independent Development Trust's Representative may issue, and if necessary, apply for an extension to the deadline for tender submission, in order to take the Addenda into account. |
| Site visit and / or clarification meeting | 8 | Attend a site visit and/or clarification meeting at which bidders may familiarise themselves with the proposed work, services or supply, location, etc. Details of the meeting are stated in the Tender Advert. |

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| Seek clarification | 9 | Request clarification of the tender documents, if necessary, by notifying Independent Development Trust's Representative earlier than the closing time for clarification of queries. |
| Pricing the tender | 10 | Include in the rates, prices, and the tendered total of the prices (if any) all duties, taxes (except VAT), and other levies payable by the successful bidder. Such duties, taxes and levies are those applicable 14 days prior to the deadline for tender submission. |
| | 11 | Show Value Added Tax (VAT) payable by Independent Development Trust separately as an addition to the tendered total of the prices. |
| | 12 | Provide rates and prices that are fixed for the duration of the contract and not subject to adjustment except as provided for in the conditions of contract. |
| | 13 | State the rates and Prices in South African Rand unless instructed otherwise as an additional condition in the Tender Data. The selected conditions of contract may provide for part payment in other currencies. |
| Alterations to documents | 14 | Cannot make any alterations or additions to the tender documents, except to comply with instructions issued by the Independent Development Trust's Representative or if necessary, to correct errors made by the bidder. All such alterations shall be initialled by all signatories to the tender. Corrections may not be made using correction fluid, correction tape or the like. |
| Alternative tenders | 15 | Submit alternative tenders only if a main tender, strictly in accordance with all the requirements of the tender documents is also submitted. The alternative tender is submitted with the main tender together with a schedule that compares the requirements of the tender documents with the alternative requirements the bidder proposes. |
| | 16 | Accept that an alternative tender may be based only on the criteria stated in the Tender Data and as acceptable to Independent Development Trust. |

Submitting a tender

- 17 Submit a tender for providing the whole of the works, services or supply identified in the Terms of Reference unless stated otherwise as an additional condition.
- 19 Submit the tender as an original plus and provide an English translation for documentation submitted in a language other than English. Tenders may not be written in pencil but must be completed in ink.
- 20 Sign the original and all copies of the tender where indicated. Independent Development Trust will hold the signatory duly authorised and liable on behalf of the bidder.
- 21 Accept that Independent Development Trust will not assume any responsibility for the misplacement or premature opening of the tender if the outer package is not sealed and marked as stated.

Note:

Independent Development Trust prefers not to receive tenders by post and takes no responsibility for delays in the postal system or in transit within or between Independent Development Trust offices.

Where tenders are sent per fax, Independent Development Trust takes no responsibility for difficulties in transmission caused by line or equipment faults.

Where tenders are sent via courier, Independent Development Trust takes no responsibility for tenders delivered to any other site than the tender office.

Independent Development Trust employees are not permitted to deposit a tender into the Independent Development Trust tender box on behalf of a bidder.

Closing time

- 22 Ensure that Independent Development Trust has received the tender at the address and in the tender box or fax specified in the Tender Advert no later than the deadline for tender submission. Proof of posting will not be taken by Independent Development Trust as proof of delivery. Independent Development Trust will not accept a tender submitted telephonically, E-mail or by telegraph unless stated otherwise in the Tender Data.
- 23 Accept that, if Independent Development Trust extends the deadline for tender submission for any reason, the requirements of these Conditions of Tender apply equally to the extended deadline.

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| Tender validity | 24 | Hold the tender(s) valid for acceptance by Independent Development Trust at any time within the validity period after the deadline for tender submission. |
| | 25 | Extend the validity period for a specified additional period if Independent Development Trust requests the bidder to extend it. A bidder agreeing to the request will not be required or permitted to modify a tender, except to the extent Independent Development Trust may allow for the effects of inflation over the additional period. |
| Clarification of tender after submission | 26 | Provide clarification of a tender in response to a request to do so from Independent Development Trust's Representative during the evaluation of tenders. This may include providing a breakdown of rates or Prices. No change in the total of the Prices or substance of the tender is sought, offered, or permitted except as required by Independent Development Trust's Representative to confirm the correction of arithmetical errors discovered in the evaluation of tenders. The total of the Prices stated by the bidder as corrected by Independent Development Trust's Representative with the concurrence of the bidder, shall be binding upon the bidder |
| Submit bonds, policies etc. | 27 | If instructed by Independent Development Trust's Representative (before the formation of a contract), submit for Independent Development Trust's acceptance, the bonds, guarantees, policies and certificates of insurance required to be provided by the successful bidder in terms of the conditions of contract. |
| | 28 | Undertake to check the final draft of the contract provided by Independent Development Trust's Representative and sign the contract all within the time required by these Conditions of Tender. The Independent Development Trust to sign and issue the contract. |
| Fulfil BEE requirements | 29 | Comply with Independent Development Trust's requirements regarding B-BBEE, Youth-owned, Disabled-owned and Black Women-owned Suppliers. |

3 Independent Development Trust's undertakings

Independent Development Trust, and Independent Development Trust's Representative, shall:

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|---------------------------------|---|---|
| Respond to clarification | 1 | Respond to a request for clarification received earlier than the closing time for clarification of queries. The response is notified to all bidders. |
| Issue Addenda | 2 | If necessary, issue to each bidder from time to time during the period from the date of the Invitation until the closing time for clarification of queries, Addenda that may amend, amplify, or add to the tender documents. If a bidder applies for an extension to the deadline for tender submission, in order to take Addenda into account in preparing a tender, Independent Development Trust may grant such an extension and Independent Development Trust's Representative shall notify the extension to all bidders. |
| Return late tenders | 3 | Tenders will be deemed late if they are not in the designated tender box at the date and time stipulated as the deadline for tender submission. |
| Tender opening | 4 | Open the tenders in the presence of the bidders' representatives who choose to attend at the time and place stated in the Tender Data. Tenders for which an acceptable notice of withdrawal has been submitted will not be opened. |
| Non-disclosure | 5 | Not disclose to bidders, or to any other person not officially concerned with such processes, information relating to the evaluation and comparison of tenders and recommendations for the award of a contract. |
| Grounds for rejection | 6 | Consider rejecting a tender if there is any effort by a bidder to influence the processing of tenders or contract award. |
| Disqualification | 7 | Instantly disqualify a bidder (and his tender) if it is established that the bidder offered an inducement to any person with a view to influencing the placing of a contract arising from this invitation to tender. |
| Test for responsiveness | 8 | <p>Determine before detailed evaluation, whether each tender properly received</p> <ul style="list-style-type: none"> • meets the requirements of these Conditions of Tender, • has been properly signed, and |

-
- Is responsive to the requirements of the tender documents.
- 9 Judge a responsive tender as one which conforms to all the terms, conditions, and specifications of the tender documents without material deviation or qualification. A material deviation or qualification is one which, in Independent Development Trust's opinion would
- detrimentally affect the scope, quality, or performance of the works, services or supply identified in the Contract Data,
 - change Independent Development Trust's or the bidder's risks and responsibilities under the contract, or
 - affect the competitive position of other bidders presenting responsive tenders, if it were to be rectified.
- Non-responsive tenders** 10 Reject a non-responsive tender, and not allow it to be subsequently made responsive by correction or withdrawal of the non-conforming deviation or reservation.
- Arithmetical errors** 11 Check responsive tenders for arithmetical errors, correcting them as follows:
- Where there is a discrepancy between the amounts in figures and in words, the amount in words shall govern.
 - If a bill of quantities applies and there is a discrepancy between the rate and the line item total, resulting from multiplying the rate by the quantity, the rate as quoted shall govern. Where there is an obviously gross misplacement of the decimal point in the rate, the line item total as quoted shall govern, and the rate will be corrected.
 - Where there is an error in the total of the Prices, either as a result of other corrections required by this checking process or in the bidder's addition of prices, the total of the Prices, if any, will be corrected.
- 12 Reject a tender if the bidder does not accept the corrected total of the Prices (if any).
- Evaluating the tender** 13 Evaluate responsive tenders in accordance with the procedure stated in the Evaluation Criteria. The evaluated tender price will be disclosed only to the

relevant Independent Development Trust tender committee and will not be disclosed to bidders or any other person.

| | | |
|---------------------------------|----|--|
| Clarification of a tender | 14 | Obtain from a bidder clarification of any matter in the tender which may not be clear or could give rise to ambiguity in a contract arising from this tender if the matter were not to be clarified. |
| Acceptance of tender | 15 | Notify the Independent Development Trust's acceptance to the successful bidder before the expiry of the validity period or agreed additional period. Providing the notice of acceptance does not contain any qualifying statements, it will constitute the formation of a contract between Independent Development Trust and the successful bidder. |
| Notice to unsuccessful bidders | 16 | After the successful bidder has acknowledged Independent Development Trust's notice of acceptance, unsuccessful bidders must consider their tenders unsuccessful if not contacted one month after date of tender closure. |
| Prepare contract documents | 17 | <p>Revise the contract documents issued by Independent Development Trust as part of the tender documents to take account of</p> <ul style="list-style-type: none"> • Addenda issued during the tender period, • inclusion of some of the tender returnable, and • Other revisions agreed between Independent Development Trust and the successful bidder, before the issue of the Independent Development Trust's notice of acceptance (of the tender). |
| Issue final contract | 18 | Issue the final contract documents to the successful bidder for acceptance within one week of the date of Independent Development Trust's notice of acceptance. |
| Sign Contract | 19 | Arrange for authorised signatories of both parties to complete and sign the original contract. If either party requires the signatories to initial every page of the contract documents, the signatories for the other party comply with the request. |
| Provide copies of the contracts | 20 | Provide to the successful bidder one copy of the contract on the date of Independent Development Trust's acceptance of the tender. |