



OPEN TENDER

IMPLEMENTATION OF A CLOUD-BASED ITSM TOOL (HOSTING, SUPPORT, MAINTANANCE AND LICENSES) FOR AN INITIAL PERIOD OF 36 MONTHS

Tender Number: IDT-NAT-ITSM-2023

Closing date: 09th June 2023 at 12H00

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 implementation of ITSM Tool in the public sector.

The Independent Development Trust (IDT) is a public entity established by the South African government to support socio-economic development in the country. As part of its commitment to providing quality services to its stakeholders, the IDT is seeking to implement an ITSM tool which is based on ITIL best practices to streamline its IT service management processes.

The IDT's IT infrastructure plays a critical role in supporting its operations, and the implementation of an ITSM tool is expected to improve service delivery, increase efficiency, and enhance the overall effectiveness of its IT team. The tool will automate routine tasks, improve collaboration and communication, and provide better visibility into service performance.

The IDT is seeking proposals from qualified suppliers with proven experience in implementing ITSM solutions. The selected supplier will be expected to deliver a solution that meets the IDT's requirements, is user-friendly, flexible, secure, and cost-effective.

The ITSM Tool should comply with all relevant regulations, including data protection and security requirements and protocols. The tool should be designed with robust security measures to ensure the confidentiality and integrity of data and should be able to withstand cyber threats. The selected supplier should have a comprehensive understanding of the regulatory framework and should be able to provide a solution that meets all applicable standards. Additionally, the tool should be scalable and adaptable to accommodate future growth and changing requirements. The successful bidder should provide ongoing support and maintenance services to ensure the smooth operation of the tool.

The ultimate objective is to acquire a supplier that will implement a cloud-based ITSM Tool (hosting, support, maintenance and licenses) for an initial period of 36 months

There is no compulsory briefing

The Tender closes on **09th June 2023** at **12H00**. Original bids must be submitted and deposited in the Tender Box at the **IDT Head Office, Corner Oberon and Sprite Streets, Glenwood Office Park – Block B, Faerie Glen, 0043**. Telegraphic, telephonic, telex, facsimile, e-mail and late tenders WILL NOT be accepted.

1.2 Objectives of the Project

Implementing a cloud-based ITSM (IT Service Management) tool that is based on ITIL (IT Infrastructure Library) can provide several benefits for the Independent Development Trust. Here are some of the main objectives that the organisation may have in implementing such a tool:

- 1) **Improve Service Delivery:** By implementing an ITSM tool based on ITIL, the IDT can improve its service delivery capabilities. ITIL provides a framework of best practices that can help the organisation manage and deliver IT services more efficiently and effectively.
- 2) **Enhance IT Operations:** An ITSM tool can help the Independent Development Trust streamline and automate its IT operations. The tool can help the organisation manage incidents, service requests, and changes more effectively, reducing the time and effort required to handle these tasks.
- 3) **Increase Transparency:** An ITSM tool can provide greater transparency into IT operations, allowing the organization to track and measure its performance against service level agreements (SLAs) and other metrics. This can help the IDT identify areas for improvement and make data-driven decisions about resource allocation and process improvement.
- 4) **Enable Self-Service:** By implementing an ITSM tool, the Independent Development Trust can enable self-service capabilities for end-users. This can allow users to request services and report incidents directly, reducing the burden on IT staff and improving response times.
- 5) **Improve Collaboration:** An ITSM tool can improve collaboration among IT staff and with other departments within the organization. The tool can provide a central repository of information about IT services and operations, enabling better communication and coordination among teams.

1.3 Scope of the Project

The scope of the project includes the following: -

- Project implementation, configuration, customisation, providing technical support, and licensing cloud-based ITSM Tool with self-service over a period of 36 months.
- The service provider will do a review of the current IT Helpdesk process to establish a clear understanding of the project objectives, deliverables and timelines.
- The service provider will do a skill transfer to (18) eighteen IT technical staff to support the implementation and maintenance of the ITSM tool for a duration of 36 months.
- The service provider will provide end-user training for 250-500 staff members.

The ITSM Tool should include but not limited to the following modules:

- IT Service Management
- Incident Management
- Project and Change Management
- Reporting and data analytics
- Remote Management
- Knowledge Management FAQs

The ITSM Tool should integrate with the following:

- Active Directory or other identity management systems
- Office 365 capabilities for enhanced collaboration and communication
- Mobile App Capabilities, including integration with popular messaging platforms like WhatsApp.

The ITSM Tool should be a Cloud-Based system

- The ITSM Tool should be compatible with various end-point devices running on Windows/ Mac OS.
- The ITSM Tool should be compatible with enterprise infrastructure technologies, including Windows Server OS versions 2008R2-2016R2 and 2019 and later versions.

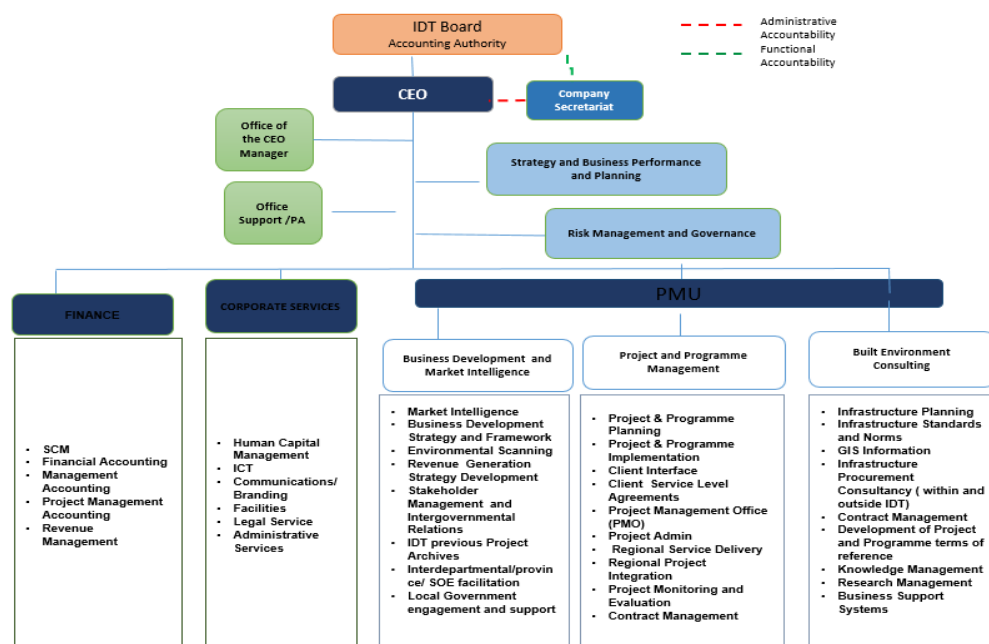
2. OVERVIEW OF IDT

2.1 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.

2.2 Organisational Structure

The high-level enterprise-wide governance structure of the IDT is represented by the organogram in Figure 4.1. The workflow of an ITSM Tool can be affected by the company structure in several ways, such as the approval process, communication channels, access levels, and training and support. It is important for companies to consider their unique structure when implementing and managing an ITSM Tool to ensure its effectiveness and efficiency.



The structure presented in Figure 1 reflects top management structure positions as at 31 March 2022

2.3 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 ITSM Tool will be used to:

- a) Support the IDT personnel in the execution of submission, approval, of internal documents
- b) Collect the information that is required to report and support management and stakeholder requirements.

2.4 ITSM Tool Stakeholders

Any group or individual affected by or having potential influence on the ITSM Tool is a stakeholder and the following key internal stakeholder groups were identified for the ITSM Tool:

INTERNAL	PMSU	PMSU
	FSU	Supply Chain Management
		Project Accounting
		Financial Management
	CSU	Legal Services
		Admin and Facilities
		ICT
		Human Resource
		Communications
		Records Management
		Risk and Compliance

	OFFICE OF THE CEO	Internal Audit
		Corporate Performance and Governance
		OCEO
	MANAGEMENT	Board / Board Committees / CEO

2.5. EVALUATION PROCEDURE

This bid will be evaluated into four phases i.e. mandatory requirement, functionality, presentation/demonstration of the proposed, price and specific goals.

Phase1 – Mandatory requirements

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

- Submission of fully completed and signed 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 2022)
- The bidder must submit a copy of National Treasury CSD Report and / MAAA Number.
- Unique SARS Tax Compliance PIN Number (Submit a valid letter)
- The bidder must submit fully completed and signed cost breakdown
- The bidder must submit OEM accreditation letter

NB: Bidders who fail to meet all of the above requirements will be eliminated and not be evaluated further on functionality.

Phase 2 - Functionality criteria

Only bidders scoring minimum of 70 points (out of 100) and above will be eligible to be evaluated further on presentation/demonstration of the proposed.

Table1: Phase 2 evaluation under functionality criteria is as follows:

Phase	Criteria	Points Allocation
Phase 2	Bidders Experience in ITSM Tool implementation and Client Reference Letters	30 points
	Methodology and Implementation Plan	25 points
	Team Members Experience Project Leader = 15 Business Analyst = 15 Developer = 15	45 points
	Total	100 points
	<i>Only bidders scoring 70 points and above under these Phase of functionality criteria will be eligible to be evaluated on demonstration and presentation.</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 **18th May 2023**.

Enquiries should be directed to the following contacts:

- For Technical matters related queries: e-mail: itsm-bid@idt.org.za
- For Supply Chain Management (SCM) related queries, e-mail: itsm-bid@idt.org.za

NB: Bidders are encouraged to send their enquiries via the above mentioned email address and no telephonic enquiries will be accepted.

3. 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		
3.1.1	The Employer is Independent Development Trust (hereinafter “IDT”) <table border="0"> <tr> <td style="vertical-align: top;"> Physical address: IDT Head Office Corner Oberon and Sprite Streets Glenwood Office Park Faerie Glen 0043 Website: www.idt.org.za </td><td style="vertical-align: top;"> The IDT Representative: e-mail: itsm-bid@idt.org.za </td></tr> </table>	Physical address: IDT Head Office Corner Oberon and Sprite Streets Glenwood Office Park Faerie Glen 0043 Website: www.idt.org.za	The IDT Representative: e-mail: itsm-bid@idt.org.za
Physical address: IDT Head Office Corner Oberon and Sprite Streets Glenwood Office Park Faerie Glen 0043 Website: www.idt.org.za	The IDT Representative: e-mail: itsm-bid@idt.org.za		
3.1.2	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 2022) • Unique SARS Tax Compliance PIN Number (Submit a valid letter) • The bidder must submit fully completed and signed cost breakdown • The bidder must submit OEM accreditation letter.		

Clause number	Tender Data / Clause description
3.1.4	There will be no compulsory briefing session.
3.1.5	Prospective bidders are encouraged to submit their requests for clarification in writing not later than 5 calendar days before the closing date.
3.1.6	The tender shall be for the entire scope as defined in the Terms of Reference
3.1.7	The Tender Validity period is 120 days from the closing date.
3.1.8	The Tender shall be submitted as follows in one envelope 1. Hard Copies of the Bid following the structure in <u>section 3.1.9</u> below
3.1.9	To facilitate the tender evaluation process, the bidders are encouraged to compile their Tender Document following the order below. PART 1: Compulsory Documents PART 2: Company's experience PART 3: Client Reference Letters PART 4: Team Members Experience (Dedicated to this bid) PART 6: Tool Proposal outlining each application PART 7: Tool Costing
3.1.10	The Invitation to Tender number is IDT-NAT-ITSM-2023
3.1.11	The deadline for tender submission is 09th June 2023 at 12H00
3.1.12	There will be no public opening of this Bid.

Clause number	Tender Data / Clause description
3.1.13	The tender shall be addressed to the Employer with a cover page indicating the following: INDEPENDENT DEVELOPMENT TRUST (IDT) IMPLEMENTATION OF A CLOUD-BASED ITSM TOOL (HOSTING, SUPPORT, MAINTANANCE AND LICENSES) FOR AN INITIAL PERIOD OF 36 MONTHS MARKED AS TENDER REF: IDT-NAT-ITSM-2023 BIDDER NAME: _____ COMPANY REGISTRATION NUMBER: _____ CSD NUMBER: _____ Physical Address for delivery of tender: IDT Head Office Glenwood Office Park, Block B Corner Oberon and Sprite Streets Faerie Glen 0043
3.1.14	The place for delivery of the tender is: The IDT Tender Box located at (main reception at the physical address given above)
3.1.15	The Bids will be evaluated on comparative basis in terms of IDT SCM Policies and Procedures.
3.1.16	Functionality Criteria Only bidders scoring minimum of 70 points (out of 100) and above will be eligible to be evaluated further on presentation/demonstration of the proposed Tool.

3.2 Evaluation Criteria

3.2.1 Phase 1: Mandatory Requirements

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

- Submission of fully completed and signed 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 2022)
- The bidder must submit a copy of National Treasury CSD Report and / MAAA Number.
- Unique SARS Tax Compliance PIN Number (Submit a valid letter)
- The bidder must submit fully completed and signed cost breakdown
- The bidder must submit OEM accreditation letter.

3.2.2 Phase2: Evaluation on Functionality Requirements

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	MAXIMUM POINTS	CRITERIA	POINTS
1. Bidders Experience in ITSM Tool implementation NB: Reference Letters must be on client's letter head with contact details, signed and dated. The letter must indicate that the bidder has undertaken ITSM Tool implementation (Only completed projects)	30	Five and above Reference Letters from previous clients the bidder undertaken ITSM Tool implementation (Only completed projects)	30
		Three – Four Reference Letters from previous clients for whom the bidder has undertaken ITSM Tool implementation (Only completed projects)	15
		One – Two Reference Letters from previous clients the bidder undertaken ITSM Tool implementation (Only completed projects)	10
		Non-Submission of Reference Letters from previous clients the bidder undertaken ITSM Tool implementation (Only completed projects)	0
2. Methodology and Implementation Plan of the ITSM Tool	25	• Project Plan (5-Points) • Customization (5), • User Training (5), • Support and Maintenance (5) (SLA), • Skills transfer Plan (5)	25
3.Team Members NB: The bidders must submit Curriculum Vitae for the proposed		Project Lead (+5 Years' Experience in Implementation)	15
		Project Lead (between 2 and 5 Years' Experience in Implementation)	10

VARIABLES	MAXIMUM POINTS	CRITERIA	POINTS
Project leader, Business analyst and developer. The CV's must clearly detail years of relevant experience and certification.	45	Project Lead (below 2 Years' Experience in Implementation)	5
		Business Analyst (+5 Years' Experience in Implementation)	15
		Business Analyst (Between 2 and 5 Years' Experience in Implementation)	10
		Business Analyst (less than 2 Years' Experience in Implementation)	5
		Development Lead (+5 Years' Experience in implementation)	15
		Development Lead (Between 2 and 5 Years' Experience in system development)	10
		Development Lead (Less than 2 Years' Experience in system development)	5
Total Points			100

NB: Only bidders who meet the threshold of 70 points and above of the total functionality points will be eligible to be evaluated on phase three.

Shortlisted bidders will be invited for demonstration of their proposed ITSM Tool.

3.2.3 Phase 3: Bidders Presentation / Demonstration of Proposed ITSM Tool

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 ITSM Tool Overview and Application of Modern Technologies, implementation, turnaround time among others.

The presentation of the ITSM Tool must be done **physically** at the IDT Head Office with the Bidders representative and the Bid Evaluation Committee (BEC).

NB: The ITSM tool should be presented on the bidder's Cloud Platform

Only bidders that obtain total 18 points thresholds out of 25 possible points will qualify to be evaluated further on Price and specific goals. (Please refer to the table below for points allocation)

The Table below, specify in detailed the criteria to be considered under the evaluation of phase three - Bidders Presentation / Demonstration for the Proposed Tool

Table 3

VARIABLES	TOTAL POINTS	CRITERIA	MAXIMUM POINTS
1. BIDDERS PRESENTATION ON ITSM TOOL	25	Tool Fully Meets IDT requirements (Terms of Reference) – 10 Points	10
		Tool does not Meet IDT requirements (Terms of Reference) - 0 Points	
		Proposed Methodology Acceptable (Terms of Reference Methodology)- 5 Points	5
		Proposed Methodology Partially Acceptable (Terms of Reference) - 3 Points	
		Proposed Methodology NOT Acceptable (Terms of Reference) - 0 Points	
		Application of Modern Technologies Outlined- 5 Points	5
		Application of Modern Technologies Partially Outlined- 3 Points	
		Application of Modern Technologies NOT Outlined- 0 Points	
		Implementation Turnaround time acceptable (90 days or below) 5 Points	5
		Implementation Turnaround time Partially acceptable (above 90 days but not exceeding 120 days) 3Points	
		Implementation Turnaround time NOT acceptable. (anything exceeding 120 days)- 0 Points	
Total Points			25

NB: Bidders who fail to meet a minimum threshold of 18 points out of possible 25 for the above table will not be evaluated further on price and specific goals.

3.2.4 Phase 4 - Evaluation on the 90/10 or 80/20 Preference Points System

Phase 4 entails the process of evaluation on price and specific goals based on the 80/20 Preference Points system as stipulated by the Preferential Procurement Policy Framework Act (PPPFA) Regulations 2022.

This bid will be evaluated as per Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022.

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

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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Women	6	
Youth	6	
People with Disabilities	4	
Black Male	4	

Source Documents to be submitted with the Bid

- *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)

NB. The above documents must not be older than 6 months

4. TENDER DETAILS

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

4.1 – List of Returnable Documents to be submitted with the tender

“Returnable documents” shall be submitted by the bidders.

1	Invitation to Bid (SBD 1)
2	Declaration of Interest (SBD 4)
3	Preference points claim form in terms of the Preferential Procurement Regulations 2022 (SBD 6.1)
4	Copy of Company Registration Documents. 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	Signed Detailed Financial Proposal 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.
6	Company Profile (Optional)
7	List of Previous Projects
8	Client Reference Letters
9	Supporting Documents for claiming Specific Goals Points: *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)

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

BID DOCUMENTS MAY BE POSTED TO: N/A

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

INVITATION TO BID (SBD 1)

PART A: INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (INDEPENDENT DEVELOPMENT TRUST (IDT))					
BID NUMBER:	IDT-NAT-ITSM-2023	CLOSING DATE:	09 th JUNE 2023	CLOSING TIME:	12H00
DESCRIPTION	IMPLEMENTATION OF A CLOUD-BASED ITSM TOOL (HOSTING, SUPPORT, MAINTANANCE AND LICENSES) FOR AN INITIAL PERIOD OF 36 MONTHS				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
INDEPENDENT DEVELOPMENT TRUST					
GLENWOOD OFFICE PARK, BLOCK B					
CNR. OBERON & SPRITE STREET					
FAERIE GLEN 0043					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON			CONTACT PERSON		
TELEPHONE NUMBER			TELEPHONE NUMBER		
FACSIMILE NUMBER			FACSIMILE NUMBER		
E-MAIL ADDRESS	itsm-bid@idt.org.za		E-MAIL ADDRESS	itsm-bid@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 SPEFIC GOALS					

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	☐ Yes ☐ No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS			
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO DOES THE ENTITY HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? ☐ YES ☐ NO IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.			

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:

SBD 4

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

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.

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

4.2.1 If so, furnish particulars:

.....
.....

4.3 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

4.3.1 If so, furnish particulars:

.....
.....

5. 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:

- 5.1 I have read and I understand the contents of this disclosure;
- 5.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 5.3 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.
- 5.4 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.

- 5.6 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.
- 5.7 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.
- 5.8 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

³ 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.

SBD 6.1

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

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

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

1. GENERAL CONDITIONS

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

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

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.

To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

PRICE	80
SPECIFIC GOALS	20
Women	6
Youth	6
People with Disabilities	4
Black Male	4
Total points for Price and SPECIFIC GOALS	100

- 1.4 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.
- 1.5 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:

80/20 or 90/10

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

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:

80/20 or 90/10

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

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

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

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

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)
Women	3	6
Youth	3	6
People with Disabilities	2	4
Black Male	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.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

5 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 ITSM Tool System. It is expected from the bidders to inform their user clients of potential site visit.

To be submitted for Costing Breakdown

NAME OF PROPOSED TOOL	
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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) – ONCE OFF		
2. PLANNING – ONCE OFF		
3. ITSM TOOL SOFTWARE LICENSING for 36 months (250-500 users)		
3.1 ITSM Tool for 36 months (250-500 users)		
3.2 IT personnel for 36 months (18 users)		
4. IMPLEMENTATION AND CONFIGURATION OF THE FOLLOWING BUT NOT LIMITED TO :		
4.1 IT Service Management		
4.2 Incident Management		
4.3 Project and Change Management		
4.4 Reporting and data analytics		
4.5 SLA Turnaround Times (User Call Logging)		
5. ITSM TOOL CUSTOMISATION		
5.1 Fit to Independent Development Trust (IDT) requirements and functionality		
5.1.1 End User Functionality		
5.1.2 Technical Functionality		
5.1.3 IDT Cloud Functionality		
6. ITSM TOOL INTEGRATION		
6.1 Active Directory or other system		
6.2 Office 365 Capabilities		
6.3 Mobile App Capabilities- (WhatsApp)		
7. HOSTING AND INFRASTRUCTURE of ITSM TOOL		
7.1 Implementation on IDT's Cloud Hosted environment.		
7.2 End Point devices compatibility (Windows OS Version)		
7.3 Enterprise Infrastructure Technologies (Windows Server OS 2008R2-2016R2, 2019)		
8. TESTING TO PRODUCTION of ITSM TOOL		
8.1 Solution testing and deployment & User Acceptance Testing		
9. SKILLS TRANSFER		
9.1 User Training- End User		

ITEM DESCRIPTION	TIMELINES	COST
9.2 Skills Transfer to ICT Team		
10. SYSTEM MAINTENANCE AND SUPPORT + DISBURSEMENTS / EXCLUSIONS- ITSM TOOL		
10.1 Year 1		
10.2 Year 2		
10.2 Year 3		
11. Sub Total excluding VAT		
12. VAT 15%		
13. Grand Total		

Signed

Date

.....

.....

Name

Bidder

.....

.....

Company Experience and Track Record

Bidders Experience in ITSM Tool Implementation

NB: The bidder must submit a list of projects as per the above criteria.

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

Client Reference Letters:

NB: Reference Letters must be on the client's letter head with contact details, signed and dated.

The letter must indicate that the bidder has undertaken ITSM Tool implementation (Only completed projects)

Refer to the functionality criteria for scoring client reference letters

6 CONDITIONS

2.1 System Conditions

- 6.8.1 The ITSM Tool must be CLOUD BASED so that IDT personnel can have access to the application anytime, anywhere.
- 6.8.2 It must be a COMMERCIALLY OFF-THE-SHELF (COTS) solution to be tailored to the IDT's requirements and functionality.
- 6.8.3 The ITSM tool should be scalable and capable of handling the growing needs of the organisation. (e.g. the number of users, devices, and service requests)
- 6.8.4 The ITSM tool should provide high-level security features to ensure that data is protected from unauthorised access.
- 6.8.5 The tool must be fully integrated with the Active Directory and office 365.
- 6.8.6 The ITSM tool must be based on COBIT and ITIL best practices
- 6.8.7 A leader in the Gartner Magic Quadrant for ITSM platforms will be an added advantage

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

7 IT Service Management Tool (ITSM TOOL)

7.8 Project Overview

The Independent Development Trust (IDT) is a public entity in South Africa that works towards promoting socio-economic development in the country. As a result, IDT needs a robust and reliable IT service management (ITSM) to manage its IT operations effectively. The implementation of a cloud-based ITSM tool based on the IT Infrastructure Library (ITIL) framework is the ideal solution for IDT's IT service management needs. This project aims to implement an ITIL-compliant ITSM tool that will provide IDT with a standardized approach to managing its IT services, improving efficiency, and reducing downtime.

The tool will include IT Service Management, incident management, change management, and service level management features. Additionally, the tool will provide a centralised platform for tracking and reporting on IT service performance, including metrics such as availability, response time, and resolution time. Ultimately, the implementation of this cloud-based ITSM tool will enable IDT to improve its IT service management capabilities, reduce downtime, and ensure the efficient delivery of IT services to its employees and clients.

The Independent Development Trust (IDT) is a public entity in South Africa that works towards promoting socio-economic development in the country. As part of its commitment to improving its IT service management (ITSM) capabilities, the IDT has decided to implement a cloud-based ITSM tool based on the Information Technology Infrastructure Library (ITIL) framework. The goal of this project is to streamline the IDT's ITSM processes, improve the quality of its IT services, and enhance customer satisfaction.



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:

- | | | |
|---|---|--|
| 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. |

- | | | |
|---------------------------------|----|--|
| 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 | <p>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.</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>Note:</p> <p>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.</p> <p>Where tenders are sent per fax, Independent Development Trust takes no responsibility for difficulties in transmission caused by line or equipment faults.</p> <p>Where tenders are sent via courier, Independent Development Trust takes no responsibility for tenders delivered to any other site than the tender office.</p> <p>Independent Development Trust employees are not permitted to deposit a tender into the Independent Development Trust tender box on behalf of a bidder.</p> |
| Closing time | <p>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.</p> <p>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.</p> |

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:

- | | | |
|---------------------------------|----------|---|
| 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 | Determine before detailed evaluation, whether each tender properly received |

-
- 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	Revise the contract documents issued by Independent Development Trust as part of the tender documents to take account of • 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.