



## **INDEPENDENT DEVELOPMENT TRUST**

### **IDT MPUN02 – SOCIAL FACILITATION PANEL**

#### **EXPRESSION OF INTEREST PROPOSAL TITLE:**

**REQUEST FOR EXPRESSION OF INTEREST PROPOSALS FOR THE PROVISION OF  
SOCIAL FACILITATION SERVICES FOR THE MPUMALANGA REGION FOR A PERIOD  
OF THREE YEARS**

**CLOSING DATE 13 NOVEMBER 2025**

The completed Bid Document, sealed in an envelope and clearly endorsed, must be placed in the Tender Box situated at the entrance to the Nelspruit Office of the Independent Development Trust (IDT)

#### **BIDDER'S INFORMATION**

*(Must be completed by Bidder)*

Company Name	
Contact Person	
Cell / Tel Number	
E-mail Address	
CSD Number	

#### **Prepared by:**

The Independent Development Trust (IDT)  
Absa Square  
20 Corner Paul Kruger and Ferreira Street  
Nelspruit  
1200

## 1. TERMS OF REFERENCE

ITEM	DESCRIPTION
<b>1.1 Social Facilitation Proposal Issue Date</b>	14 October 2025
<b>1.2 Compulsory Briefing</b>	Not Applicable / No briefing will be undertaken
<b>1.3 Social Facilitation Proposal Closing Date</b>	13 November 2025 @12:00pm – No late submissions will be received and/or considered.
<b>1.4 Quote Reference No.</b>	IDT MPUN02 – Social Facilitation Panel
<b>1.5.1 Enquiries</b>	<p>Any queries shall be directed in writing to the IDT and shall be addressed to the contact person/s in the addresses indicated below;</p> <p><b>Name:</b> Mr. Sylvia Sibiya (Technical)  <b>Email:</b> <a href="mailto:SylviaS@idt.org.za">SylviaS@idt.org.za</a> (08h00 – 16h30 weekdays only)</p> <p><b>Name:</b> Ms. Surprise Mthombeni (Bid Administration)  <b>Email:</b> <a href="mailto:SurpriseM@idt.org.za">SurpriseM@idt.org.za</a> (08h00 – 16h30 weekdays only)</p> <p><b>Please note: Enquiries should reach IDT five days before the closing date.</b></p>
<b>1.5.2 Submission of Social Facilitation Proposal documents</b>	<p>Social Facilitation expression of interest Proposal documents shall be <b>hand delivered</b> in one (1) bound/combined pack (<i>i.e., Bid document and its accompanying Annexures</i>) to the <i>Implementing Agent (IDT)</i>, and shall be marked as follows:</p> <p><b>The Independent Development Trust (IDT)</b>  Absa Square  20 Corner Paul Kruger and Ferreira Street  Nelspruit  1200</p> <p><b>Marked confidential Social Facilitation Proposal and Indicate the Following:</b></p> <p><b>IDT MPUN02 – Social Facilitation Panel</b></p> <p><b>THE BID BOX IS LOCATED AT THE IDT'S MAIN RECEPTION AREA AS PER THE ADDRESS INDICATED ABOVE</b></p>

<p><b>1.6.1 Compulsory Requirements</b></p>	<p>1.6.1.1 Proof of local address in Mpumalanga Province: company office and key team members e.g. Municipal Bill, Rental Agreement, proof of ownership etc.</p> <p>1.6.1.2 Valid CIPC</p> <p>1.6.1.3 Fully completed and signed</p> <ul style="list-style-type: none"> <li>o SBD1: Invitation to bid.</li> <li>o SBD4: Bidder's disclosure</li> </ul> <p>1.6.1.4 Valid Letter of Good standing i.e. COIDA Certificate from DOL / RMA / FEM (Companies without staff must submit letter from the Department of Labour in place of COIDA Certificate)</p> <p>1.6.1.5 Authority to Sign this Bid for companies that has more than one director</p> <p>1.6.1.6 Fully compliant CSD Certificate</p> <p>1.6.1.7 Tax compliance</p> <p>1.6.1.8 People with Disability to submit a Letter from the Doctor confirming disability, the letter must have a doctor's practice number</p> <p>1.6.1.9 The Social Facilitation Proposal</p> <p>1.6.1.10 Social Facilitation implementation plan</p> <p>1.6.1.11 Copy of the Joint venture (JV)/Consortium agreement signed by both parties (where applicable including apportionment of the JV)</p> <ul style="list-style-type: none"> <li>o JV Agreement must be signed by all parties.</li> <li>o COIDA/FEM/RMA for all parties</li> <li>o CSD registration for all parties</li> </ul> <p>Joint Venture/ Consortium bidders must satisfy JV requirements above to be considered in the Social Facilitation panel.</p> <p><b><u>FAILURE TO COMPLY WITH ANY OF THE ABOVE WILL LEAD TO DISQUALIFICATION</u></b></p> <p>The IDT reserves the right to verify the validity of the submitted documents</p>
<p><b>1.6.2 Compulsory Returnable document at the Stage of award</b></p>	<p>The following returnable documents shall be submitted together with the RFQ. The validity of this documentation will be verified at the time of award.</p> <p>1.6.2.1 Fully compliant CSD Certificate</p> <p>1.6.2.2 Valid Tax compliance letter with a unique pin</p> <p>1.6.2.3 Company Registration documents (CIPC)</p> <p>1.6.2.4 Declaration that information on CSD is correct and up to date</p> <p>1.6.2.5 Valid Letter of Good standing i.e. COIDA Certificate / FEM (Companies without staff must submit letter from the Department of Labour in place of COIDA Certificate)</p> <p>Notes:</p> <p><b><u>FAILURE TO COMPLY WITH ANY OF THE ABOVE WILL LEAD TO DISQUALIFICATION</u></b></p>

1.7 Evaluation Criteria	1.7.1 Administrative compliance evaluation 1.7.2 Functional evaluation																										
1.8 FUNCTIONALITY AND	1.8.1 Functional evaluation																										
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	<p>The Bidder must submit a proposal and implementation plan that summarise how Social Facilitation will be rolled out in a typical project.</p>																										
	<p>1.8.2 Bidders are required to score a minimum of 70 points on Functionality in order to qualify to be in the panel of social facilitators for the Mpumalanga region over a period of three years.</p>																										
	<p><b>FUNCTIONAL EVALUATION</b></p>																										
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		<ul style="list-style-type: none"> <li>National Diploma in community development/social facilitation related.</li> </ul>	5	
		<b>Proof of the team's relevant experience in Social Facilitation in construction projects of the director</b>	<b>15</b>	
		<ul style="list-style-type: none"> <li>10 years and above experience</li> </ul>	15	
		<ul style="list-style-type: none"> <li>5-9 years' experience</li> </ul>	10	
		<ul style="list-style-type: none"> <li>1-4 years' experience</li> </ul>	5	
		<b>The quality of the proposed methodology must meet the objectives of the Social Facilitation and community empowerment.</b>	<b>35</b>	
		<ul style="list-style-type: none"> <li>Feasibility study</li> </ul>	10	
		<ul style="list-style-type: none"> <li>Planning</li> </ul>	10	
		<ul style="list-style-type: none"> <li>Implementation</li> </ul>	10	
		<ul style="list-style-type: none"> <li>Project closure</li> </ul>	5	
		<ul style="list-style-type: none"> <li>Not submitted</li> </ul>	0	
		<b>The practicality of the Implementation Plan, showing how social facilitation activities aligns with the project.</b>	<b>15</b>	
		<ul style="list-style-type: none"> <li>Detailed</li> </ul>	15	
		<ul style="list-style-type: none"> <li>Moderate</li> </ul>	5	
		<ul style="list-style-type: none"> <li>Poor</li> </ul>	0	
		<b>Total</b>	<b>100</b>	
		Threshold	70	
<b>1.9 Bid Award Criteria</b>	1.9.1 The bidder must have a Compliant Tax Status			
	1.9.2 A fully completed and signed Invitation to Bid document (SBD 1 and 4)			
	1.9.3 Failure to comply with items 1.6.2.2 (tax compliance) within a reasonable period (7 calendar days) as would be indicated by the IDT, will result in the bidder being non-responsive.			

ITEM	DESCRIPTION																																																	
1.11 Project Staff	1.12.1 The Service Provider is to provide CVs of the key personnel to be used for the purposes of this panel, outlining their relevant experience and attach proof of their certified relevant qualifications/ professional registration related to the discipline. Include the key team members' proximity and locality address within the three districts in Mpumalanga province, as per table below. Please attach the project team's organogram																																																	
	1.12.2 Such personnel shall be always available for panel related projects. Should these personnel be changed for some or other reason, he/she should be replaced by a person of equivalent or higher qualification and registration status. Such changes must be communicated to IDT.																																																	
	<table><tr><td rowspan="2">#</td><td></td><td colspan="3">KEY TEAM/PERSONNEL'S LOCALITY</td></tr><tr><td>TEAM NAMES</td><td>LOCAL MUNICIPALITY</td><td>DISTRICT</td><td>MPUMALANGA</td></tr><tr><td>1</td><td></td><td></td><td></td><td></td></tr><tr><td>2</td><td></td><td></td><td></td><td></td></tr><tr><td>3</td><td></td><td></td><td></td><td></td></tr><tr><td>4</td><td></td><td></td><td></td><td></td></tr><tr><td>5</td><td></td><td></td><td></td><td></td></tr><tr><td>6</td><td></td><td></td><td></td><td></td></tr><tr><td>7</td><td></td><td></td><td></td><td></td></tr><tr><td>8</td><td></td><td></td><td></td><td></td></tr></table>	#		KEY TEAM/PERSONNEL'S LOCALITY			TEAM NAMES	LOCAL MUNICIPALITY	DISTRICT	MPUMALANGA	1					2					3					4					5					6					7					8				
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1.12 Scope of Works	1.11.1 Refer to section 2																																																	
1.3 Service Level Agreement	1.13.1 The service provider will be expected to enter into a <b>Service Level Agreement</b> with the IDT.																																																	
1.14 Bid Document and Contract	1.14.1 The Bidder is advised to ensure that they familiarise themselves with all the contents of the bid documents as those will form the basis of the contract to be entered.																																																	
	1.14.2 Any contents of this document that the bidder requires clarity on shall be brought forward before the bid submission date stipulated in this bid document.																																																	
	1.14.3 Conditions of Contract will be specified in the SLA to be entered into by successful bidders																																																	
	1.14.4 Note: The RFQ Document must be completed using permanent black ink.																																																	
	1.14.5 All RFQ documents submitted to the IDT will become the property of the IDT and will as such not be returned to the																																																	

	<p>bidders. Proprietary information should be identified as such in each proposal.</p> <p>1.14.6 This document must be used solely for the purpose it is intended to achieve.</p> <p>1.14.7 IDT reserves the right to subject Bidders and their facilities to assessment as part of the evaluation process or as a condition to be appointed.</p> <p>1.14.8 If the IDT amends these references, the amendment will be sent to all bidders in writing. No oral amendments by any person will be considered or acknowledged.</p>
<p><b>1.15 IDT's Reservation of Rights</b></p>	<p>1.15.1 The Service Providers attention is specifically drawn to the fact that success in forming part of the Mpumalanga Panel of Social Facilitation services providers will not guarantee an award of work contracts. Work contracts will be awarded based of a competitive RFQ bidding process amongst the service providers that will become Mpumalanga Panel of Social Facilitation providers.</p> <p>1.15.2 IDT's reservation of rights: IDT reserves the right to cancel or withdraw this request for Fee proposals without prior notice and without furnishing any reasons whatsoever.</p>

## **2. SCOPE OF WORKS – SOCIAL FACILITATION PANEL**

### **2.1 DESCRIPTION OF SOCIAL FACILITATION SERVICES**

The Independent Development Trust (IDT), listed in terms of the Public Finance Management Act (PFMA) as a Schedule 2 entity, is mandated to provide social infrastructure delivery management services as a contribution to the national development agenda. The entity delivers social infrastructure through a participatory approach leaning towards people-centeredness and incorporates the empowerment of historically vulnerable groups in its development efforts and performance indicators.

Social facilitation is a process through which projects or programs are designed, initiated, and implemented from beginning to the end with full participation of all affected and interested key stakeholders. The idea is to ensure that interventions are organic and locally owned and that desired outcomes are planned and achieved in a sustainable manner.

Social facilitation is thus not only, or even primarily, about assuring that the community is consulted about infrastructural development, but rather about establishing processes through which the community or stakeholders can create meaningful, ongoing change, with the assistance and collaboration of the IDT. Social facilitation is a powerful process of uniting and influencing communities and stakeholders, government, and other interest parties leading to the creation of viable strategies for the fulfilment of local needs and aspirations. In summary, the key objectives of social facilitation include the following:

- Mobilise communities or key stakeholders around programs and projects for their support and participation.
- Establish networks with local structures and stakeholders of the programme to reduce incidents of conflict.
- Facilitate the creation of networking, and partnership establishment to maximize the impact and sustainability of programs.
- Fulfil people's democratic rights by empowering communities to actively participate and take ownership of their development.
- Create an enabling environment for the effective implementation of the infrastructure projects at a community level.
- Use of local resources, localization, and beneficiation.
- Create sustainable jobs; increase social capital and strengthen strategic planning.
- Create a conducive environment for Co-ownership and ensure development integration and smooth implementation of projects.



## **2.2 SOCIAL FACILITATION SCOPE STATEMENT**

The role of Social Facilitation services in IDT Social Infrastructure projects shall include the following:

- Social Facilitation Project Planning
- Community Profiling - Desk-top Research
- Stakeholders mapping and engagement – Project landing
- Establishment and induction of the Project Steering Committee (PSC)
- Appointment and induction of the Community Liaison Office (CLO)
- Local community empowerment, labour recruitment, and enterprise development for co-creation.
- Recruitment and selection of local workers and subcontractors
- Continuous stakeholder management – risk and conflict management.
- Project monitoring, evaluation and reporting
- Final Social Facilitation reporting.
- Project commissioning and hand-over

## **2.3 SOCIAL FACILITATION IMPLEMENTATION APPROACH**

### **2.3.3 Project Identification**

- Community needs analysis
- Co-creation and solution design
- Prioritisation with the community
- Determine intergovernmental deficiencies
- Resourcing and Best value for money

### **2.3.4 Feasibility Study**

- Social Development Feasibility study of the project
- Community beneficiation and potential for co-creation and co-ownership.

### **2.3.5 Planning**

- Community profiling – baseline study for localisation
- Local asset mapping
- Local authority engagement and project landing
- Stakeholders mapping and engagement.
- SMMEs and local suppliers' development support.
- Establishment and training / induction of the Project Steering Committee (PSC).
- Appointment and training / induction of the Community Liaison Officer.

### **2.3.6 Procurement and community empowerment**

- Determine locally available assets/materials and suppliers
- Determine the procurement strategy.
- Sub-contracting.
- SMMEs development support (database of Local suppliers SMMEs).
- Skills audit and community empowerment.

### **2.3.7 Implementation: Social Facilitation**

- Facilitation of Co-creation and implementation of infrastructure.
- Training and capacity building programme for co-ownership.
- Employment creation.
- Risk management.
- Conflict management.
- Continuous stakeholder management.
- Facilitation of local supply of materials.

### **2.3.8 Monitor the project implementation process**

- Monitor community change management.
- Social and economic maximisation.
- Regular meetings (site meetings and stakeholder meetings)
- Lessons learnt and reporting.

### **2.3.9 Continuous stakeholder management**

- Risk and conflict management
- Community engagement for feedback
- PSC and CLO support.

### **2.3.10 Handover and close out**

- Analyse project delivery - community participation, engagement, localisation, and ownership.
- Developing key learnings.
- Build best practices.
- Assess and recommend areas of improvement and upscaling.

### 3. SOCIAL FACILITATION PROPOSAL (TIMELINE ESTIMATE)

STAGE NAME	FDPM STAGE GATE OBJECTIVES	STAGE/GATE NO – FDPM	WHAT TO DO / ACTIVITIES / SUB-PROCESSED	DELIVERABLES	STAGE GATE	TIMELINES ESTIMATES IN WEEKS/MONTNS
1. Initiation - Project Identification	The conceptualisation of priority Community-Mandated projects that meet the local needs through Co-creation and Co-ownership with the local community for Organic solutions.	PJ-S0	<ul style="list-style-type: none"><li>Conduct a community workshop</li><li>Stakeholder engagement</li><li>Budgeting</li></ul>	<ul style="list-style-type: none"><li>Community-based plan</li></ul>	5%	
				<ul style="list-style-type: none"><li>Attendance register</li></ul>		
				<ul style="list-style-type: none"><li>Minutes</li></ul>		
				<ul style="list-style-type: none"><li>Community-based plan with priority projects</li></ul>		
				<ul style="list-style-type: none"><li>Government priority programmes</li></ul>		
				<ul style="list-style-type: none"><li>Integration planning</li></ul>		
				<ul style="list-style-type: none"><li>Appointment letter</li></ul>		
2. Social Development Feasibility study – non-technical	To develop a Social Development Feasibility study	PJ-S1-A	<ul style="list-style-type: none"><li>Desktop research and</li><li>Community Research</li><li>Site inspection</li></ul>	<ul style="list-style-type: none"><li>Community Profile and baseline study.</li><li>Project beneficiation report</li></ul>	5%	
3. Planning – (Project landing and stakeholder engagement)	Prepare for proper project landing for Co-ownership and Co-Creation.	PJ-S1-B	<ul style="list-style-type: none"><li>Engagement with local authorities to introduce the project.</li></ul>	<ul style="list-style-type: none"><li>Local authority engagement report</li></ul>	15%	
	Mapping of local community assets for organic development		<ul style="list-style-type: none"><li>Community mapping.</li></ul>	<ul style="list-style-type: none"><li>Report on the available local materials and suppliers.</li></ul>		
			<ul style="list-style-type: none"><li>Stakeholder identification, engagement and analysis</li></ul>	<ul style="list-style-type: none"><li>Stakeholders' engagement report</li><li>Minutes of stakeholder engagement meeting</li></ul>		
	Establishment of local and representative project governance structures.			<ul style="list-style-type: none"><li>Establishment and induction of PSC</li></ul>		<ul style="list-style-type: none"><li>PSC establishment and induction report</li></ul>
			<ul style="list-style-type: none"><li>Appointment and induction of CLO</li></ul>	<ul style="list-style-type: none"><li>CLO recruitment report</li></ul>		
			<ul style="list-style-type: none"><li>Introduce PSC and CLO to the contractor</li></ul>	<ul style="list-style-type: none"><li>Project site handover attendance registers and minutes</li></ul>		

STAGE NAME	FDPM STAGE GATE OBJECTIVES	STAGE/GATE NO – FDPM	WHAT TO DO / ACTIVITIES / SUB-PROCESSED	DELIVERABLES	STAGE GATE	TIMELINES ESTIMATES IN WEEKS/MONTNS
			• Report writing	Detailed Social Facilitation Plan.		
4. Procurement - community empowerment	To profile the community and map basic assets that are mainly impacted by the project.	PJ-S1-8	• Local community assets mapping (Local materials and suppliers)	• Community profile report. - database for local suppliers of materials	20%	
	Planning for impactful job creation and community empowerment		• Engagement with stakeholders (Contractor, community, PSC, CLO for worker recruitment plan.	• Determine the local recruitment strategy • Database of local workers • Required workers and- skills		
			• Recruitment and placement of workers (local participants) • Establishment of databases for trades which are identified for community upliftment (SMME Development)	• Local Worker / Participants recruitment plan/strategy		
			• Skills analysis	• Skills analysis and training needs report for specific projects.		
	Skills development and training (for <u>co-creation</u> and <u>co-ownership</u> )		• Facilitation of local supply of materials	• Procurement strategy		
	Enterprise development support					
5. Implementation	Job Creation	PJ-S5	CONTINUOUS:  • Recruitment of local workers / participants	MONTHLY REPORT ON: • Local Worker / Participants recruitment report  • Job creation report	45%	
	Local enterprise development support		• Facilitation of transaction of materials between the enterprises and the project.	• Local suppliers' procurement report • Impact assessment report		

STAGE NAME	FDPM STAGE GATE OBJECTIVES	STAGE/GATE NO – FDPM	WHAT TO DO / ACTIVITIES / SUB-PROCESSED	DELIVERABLES	STAGE GATE	TIMELINES ESTIMATES IN WEEKS/MONTNS
			<ul style="list-style-type: none"><li>• Ensure sub-contracting of local SMMEs (utilisation of established databases)</li></ul>			
	Risk conflict management		<ul style="list-style-type: none"><li>• Meetings with Stakeholders (PSC, Community, CLO and contractor, IDT).</li></ul>	<ul style="list-style-type: none"><li>• Risk management plan and report</li></ul>		
				<ul style="list-style-type: none"><li>• Database of local workers participants</li></ul>		
				<ul style="list-style-type: none"><li>• Issue log</li></ul>		
				<ul style="list-style-type: none"><li>• Conflict management report</li></ul>		
	Continuous Monitor the project implementation process (and consideration of social and economic developmental imperatives; Monitoring community change management.		<ul style="list-style-type: none"><li>• Meetings with Stakeholders (PSC, Community, CLO and contractor, IDT).</li></ul>	<ul style="list-style-type: none"><li>• Stakeholder engagement report</li></ul>		
				<ul style="list-style-type: none"><li>• Attendance register</li></ul>		
				<ul style="list-style-type: none"><li>• Minutes of meetings</li></ul>		
				<ul style="list-style-type: none"><li>• Progress report</li></ul>		
				<ul style="list-style-type: none"><li>• Local business development support report.</li></ul>		
				<ul style="list-style-type: none"><li>• Community development monitoring/change report</li></ul>		
				<ul style="list-style-type: none"><li>• Risk management report</li></ul>		
				<ul style="list-style-type: none"><li>• Community engagement for feedback</li></ul>		
				<ul style="list-style-type: none"><li>• PSC and CLO report</li></ul>		
				<ul style="list-style-type: none"><li>• Meeting Attendance Registers</li></ul>		
				<ul style="list-style-type: none"><li>• Programme evaluation</li></ul>		<ul style="list-style-type: none"><li>• Lessons learned report</li></ul>

STAGE NAME	FDPM STAGE GATE OBJECTIVES	STAGE/GATE NO – FDPM	WHAT TO DO / ACTIVITIES / SUB-PROCESSED	DELIVERABLES	STAGE GATE	TIMELINES ESTIMATES IN WEEKS/MONTNS
						Start date
6. Handover and – (Project closure)	To handover the SF project to the client with the final report		Stakeholder engagement – communities and beneficiaries	Minutes and attendance registers of meetings with stakeholders	10%	
				SF closeout report		
				SF Programme evaluation report		
				Lessons learnt report		
				Reviewed SF Framework		
			To facilitate project closure, and reporting	Final SF Closeout report		

**SBD 1****YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE INDEPENDENT DEVELOPMENT TRUST**

BID NUMBER:	<b>IDT    MPUN02    Social Facilitation Panel</b>	CLOSING DATE:	13 November 2025	CLOSING TIME:	12h00
DESCRIPTION	Request for expression of interest proposals for the provision of social facilitation services for the Mpumalanga region for a period of three years				

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

IDT Mpumalanga Regional Office:

20 Corner Paul Kruger and Ferreira Street

Absa Square

Nelspruit

1200

<b>BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO</b>		<b>TECHNICAL ENQUIRIES MAY BE DIRECTED TO:</b>	
CONTACT PERSON	<b>Surprise Mthombeni</b>	CONTACT PERSON	<b>Sylvia Sibiya</b>
TELEPHONE NUMBER	<b>013 752 2200</b>	TELEPHONE NUMBER	<b>013 752 2200</b>
FACSIMILE NUMBER		FACSIMILE NUMBER	
E-MAIL ADDRESS	<b>surprisem@idt.org.za</b>	E-MAIL ADDRESS	<b>sylvias@idt.org.za</b>

**SUPPLIER INFORMATION**

NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELMPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT            REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		<b>OR</b>	CENTRAL SUPPLIER DATABASE No:	MAAA

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
---	--	--	--

#### QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS

IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ 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, 2017, 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:

.....

**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 interest<sup>1</sup> in the enterprise, employed by the state? **YES/NO**

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

Full Name	Identity Number	Name of State institution

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

2.2.1. If so, furnish particulars:

.....  
 .....

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

---

<sup>1</sup> 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.

2.3.1. If so, furnish particulars:

.....  
.....

### 3 DECLARATION

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

- 3.1 I have read and I understand the contents of this disclosure;
- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium<sup>2</sup> will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

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

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

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

---

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

## **AUTHORITY TO SIGN A BID**

### **A. COMPANIES**

If a Bidder is a company, a certified copy of the resolution by the board of directors, personally signed by the chairperson of the board, authorising the person who signs this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the company must be submitted with this bid, that is before the closing time and date of the bid

### **AUTHORITY BY BOARD OF DIRECTORS**

By resolution passed by the Board of Directors on .....20.....,

Mr/Mrs/Ms.....

(whose signature appears below) has been duly authorised to sign all documents in connection with this bid on behalf of

(Name of Company) .....

**IN HIS/HER CAPACITY AS:** .....

**SIGNED ON BEHALF OF COMPANY:** .....

.....  
(PRINT NAME)

**SIGNATURE OF SIGNATORY:** ..... **DATE:** .....

**WITNESSES:** 1.....

2.....

### **B. SOLE PROPRIETOR (ONE - PERSON BUSINESS)**

I, the undersigned..... hereby confirm that I am the sole owner of the business trading as.....

.....

**SIGNATURE**.....

**DATE**.....

### C. PARTNERSHIP

The following particulars in respect of every partner must be furnished and signed by every Partner:

Full name of partner	Residential address	Signature
.....	.....	.....
.....	.....	.....
.....	.....	.....

We, the undersigned partners in the business trading as .....  
hereby authorise .....to sign this bid as well as any contract  
resulting from  
the bid and any other documents and correspondence in connection with this bid and /or contract on  
behalf of

.....  
**SIGNATURE**

.....  
**SIGNATURE**

.....  
**SIGNATURE**

.....  
**DATE**

.....  
**DATE**

.....  
**DATE**

### D. CLOSE CORPORATION

In the case of a close corporation submitting a bid, a certified copy of the Founding Statement of such corporation shall be included with the bid, together with the resolution by its members authorising a member or other official of the corporation to sign the documents on their behalf.

By resolution of members at a meeting on ..... 20.....

at..... Mr/Mrs/Ms....., whose signature  
appears below, has been authorised to sign all documents in connection with this bid on behalf of

(Name of Close Corporation) .....

.....

**SIGNED ON BEHALF OF CLOSE CORPORATION:** .....

.....  
(PRINT NAME)

**IN HIS/HER CAPACITY AS** ..... **DATE:** .....

**SIGNATURE OF SIGNATORY:** .....

**WITNESSES:**

1.....  
.....

2.....

#### **E. CO-OPERATIVE**

A certified copy of the Constitution of the co-operative must be included with the bid, together with the resolution by its members authoring a member or other official of the co-operative to sign the bid documents on their behalf.

By resolution of members at a meeting on ..... 20.....

at.....

Mr/Mrs/Ms....., whose signature appears below, has  
been authorised to sign all documents in connection with this bid on behalf of (Name of cooperative)

.....

**SIGNATURE OF AUTHORISED REPRESENTATIVE/SIGNATORY:** .....

**IN HIS/HER CAPACITY AS:** .....

**DATE:** .....

**SIGNED ON BEHALF OF CO-OPERATIVE:** .....

**NAME IN BLOCK LETTERS:** .....

**WITNESSES: 1**.....

**2**.....

## **F JOINT VENTURE**

If a bidder is a joint venture, a certified copy of the resolution/agreement passed/reached signed by the duly authorised representatives of the enterprises, authorising the representatives who sign this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the joint venture must be submitted with this bid, before the closing time and date of the bid.

### **AUTHORITY TO SIGN ON BEHALF OF THE JOINT VENTURE**

By resolution/agreement passed/reached by the joint venture partners on.....20.....

Mr/Mrs/Ms.....,Mr/Mrs/Ms.....

Mr/Mrs/Ms.....and Mr/Mrs/Ms.....

(whose signatures appear below) have been duly authorised to sign all documents in connection with this bid

on behalf of:(Name of Joint Venture) .....

**IN HIS/HER CAPACITY AS:** .....

**SIGNED ON BEHALF OF (COMPANY NAME):** .....

**(PRINT NAME)** .....

**SIGNATURE:** ..... **DATE:** .....

**IN HIS/HER CAPACITY AS:** .....

**SIGNED ON BEHALF OF (COMPANY NAME):** .....

**(PRINT NAME)**.....

**SIGNATURE:** ..... **DATE:** .....

IN HIS/HER CAPACITY AS: .....

SIGNED ON BEHALF OF (COMPANY NAME): .....

(PRINT NAME) .....

SIGNATURE: ..... DATE: .....

IN HIS/HER CAPACITY AS: .....

#### **G. CONSORTIUM**

If a bidder is a consortium, a certified copy of the resolution/agreement passed/reached signed by the duly authorised representatives of concerned enterprises, authorising the representatives who sign this bid to do so, as well as to sign any contract resulting from this bid and any other documents and correspondence in connection with this bid and/or contract on behalf of the consortium must be submitted with this bid, before the closing time and date of the bid.

#### **AUTHORITY TO SIGN ON BEHALF OF THE CONSORTIUM**

By resolution/agreement passed/reached by the consortium on.....20.....

Mr/Mrs/Ms.....

(whose signature appear below) have been duly authorised to sign all documents in connection with this bid on behalf of:

(Name of Consortium) .....

**IN HIS/HER CAPACITY AS:** .....

**SIGNATURE:** ..... **DATE:** .....



## KEY PERSONNEL (DIRECTORS/ EMPLOYEES/ MANAGEMENT) SCHEDULE

### EVALUATION SCHEDULE: KEY PERSONNEL ASSIGNED TO THE PROJECT

The Bidder shall insert in the spaces provided on the following pages details of the key personnel required to be in the employment of the bidder, in order for the bidder to be eligible to submit a bid for projects. Certified proof of qualifications and professional registration (not older than six months) must be appended to these schedules, together with the Curriculum Vitae of each individual. Failure to attach them will result in a zero score.

The Bidder shall list below the personnel that he intends to utilize on the Works, including key personnel that may have to be brought in from outside if not attached to the bidder's organisation. The proposed personnel cannot be replaced without an approval of the employer.

Insert in the table below the key personnel and their proposed function

Only key personnel listed on the table below will only be considered for evaluation

#### 1. KEY PERSONNEL 2: CURRICULUM VITAE: DIRECTOR

(Detailed CV'S, originally certified copies (not older than 6 months) of qualifications and registrations, certificates for key personnel are required and must be attached in support of this form

No.	Key Person Name	Category of key personnel	Qualifications	Professional Registration	Years of Experience
1.		Director			
2.		Co-Director		N/A	
3		Management			
4		Specialist Resource			
5					
6					
7					
8					
9					
10					

## 1. KEY PERSONNEL 1: CURRICULUM VITAE: DIRECTOR

Name:		Date of birth:
Profession:		Nationality:
Qualifications:		
Professional Body:	Category of Registration:	Registration Number:
Professional Body:	Category of Registration:	Registration Number:
Professional Body:	Category of Registration:	Registration Number:
Name of Employer :		
Current position:		Years of Experience:
<u>Employment Record:</u>		
<u>Relevant Experience Required:</u>		

Certification:

I, the undersigned, certify that, to the best of my knowledge and belief, this data correctly describes me, my qualifications and my experience.

.....  
SIGNATURE OF THE INCUMBENT

\_\_\_\_\_  
INCUMBENT'S IDENTITY NUMBER

## 2. KEY PERSONNEL 2: CURRICULUM VITAE: CO-DIRECTOR

Name:	Date of birth:
Profession:	Nationality:
Qualifications:	
Name of Employer:	
Current position:	Years of Experience:
<u>Employment Record:</u>	
<u>Relevant Experience Required:</u>	

Detailed CV'S, originally certified copies (not older than 6 months) of qualifications and registrations, certificates for key personnel are required and must be attached in support of this form) Certification:

I, the undersigned, certify that, to the best of my knowledge and belief, this data correctly describes me, my qualifications, and my experience.

.....  
SIGNATURE OF THE INCUMBENT

\_\_\_\_\_  
INCUMBENT'S IDENTITY NUMBER

### 3. KEY PERSONNEL 3: CURRICULUM VITAE: MANAGEMENT

Name:	Date of birth:
Profession:	Nationality:
Qualifications:	
Name of Employer:	
Current position:	Years of Experience:
<u>Employment Record:</u>	
<u>Relevant Experience Required:</u>	

Detailed CV'S, originally certified copies (not older than 6 months) of qualifications and registrations, certificates for key personnel are required and must be attached in support of this form) Certification:

I, the undersigned, certify that, to the best of my knowledge and belief, this data correctly describes me, my qualifications, and my experience.

.....  
SIGNATURE OF THE INCUMBENT

\_\_\_\_\_  
INCUMBENT'S IDENTITY NUMBER

#### 4. KEY PERSONNEL 4: CURRICULUM VITAE: SPECIALIST

Name:	Date of birth:
Profession:	Nationality:
Qualifications:	
Name of Employer:	
Current position:	Years of Experience:
<u>Employment Record:</u>	
<u>Relevant Experience Required:</u>	

Detailed CV'S, originally certified copies (not older than 6 months) of qualifications and registrations, certificates for key personnel are required and must be attached in support of this form) Certification:

I, the undersigned, certify that, to the best of my knowledge and belief, this data correctly describes me, my qualifications, and my experience.

.....

.....

SIGNATURE OF THE INCUMBENT

\_\_\_\_\_  
INCUMBENT'S IDENTITY NUMBER

## 5. KEY PERSONNEL 2: CURRICULUM VITAE: SPECIALIST

Name:	Date of birth:
Profession:	Nationality:
Qualifications:	
Name of Employer:	
Current position:	Years of Experience:
<u>Employment Record:</u>	
<u>Relevant Experience Required:</u>	

Detailed CV'S, originally certified copies (not older than 6 months) of qualifications and registrations, certificates for key personnel are required and must be attached in support of this form) Certification:

I, the undersigned, certify that, to the best of my knowledge and belief, this data correctly describes me, my qualifications, and my experience.

.....

SIGNATURE OF THE INCUMBENT

\_\_\_\_\_  
INCUMBENT'S IDENTITY NUMBER

## **STANDARD CONDITIONS OF TENDER**

### **Standard Conditions of Tender**

**The employer and each tenderer submitting a tender offer shall comply with these conditions of tender. In their dealings with each other, they shall discharge their duties and obligations as set out in the tender data, timeously and with integrity, and behave equitably, honestly and transparently, comply with all legal obligations and not engage in anticompetitive practices.**

- The employer and the tenderer and all their agents and employees involved in the tender process shall avoid conflicts of interest and where a conflict of interest is perceived or known, declare any such conflict of interest, indicating the nature of such conflict. Tenderers shall declare any potential conflict of interest in their tender submissions. Employees, agents and advisors of the employer shall declare any conflict of interest to whoever is responsible for overseeing the procurement process at the start of any deliberations relating to the procurement process or as soon as they become aware of such conflict and abstain from any decisions where such conflict exists or recuse themselves from the procurement process, as appropriate.

Note: 1) A conflict of interest may arise due to a conflict of roles which might provide an incentive for improper acts in some circumstances. A conflict of interest can create an appearance of impropriety that can undermine confidence in the ability of that person to act properly in his or her position even if no improper acts result.

2) Conflicts of interest in respect of those engaged in the procurement process include direct, indirect or family interests in the tender or outcome of the procurement process and any personal bias, inclination, obligation, allegiance or loyalty which would in any way affect any decisions taken.

- The employer shall not seek and a tenderer shall not submit a tender without having a firm intention and the capacity to proceed with the contract.

- a) **Conflict of interest** means any situation in which:
  - i) someone in a position of trust has competing professional or personal interests which make it difficult to fulfil his or her duties impartially;
  - ii) an individual or organisation is in a position to exploit a professional or official capacity in some way for their personal or corporate benefit; or
  - iii) incompatibility or contradictory interests exist between an employee and the organisation which employs that employee.
- b) **Comparative offer** means the tenderer's financial offer after all tendered parameters that will affect the value of the financial offer have been taken into consideration in order to enable comparisons to be made between offers on a comparative basis
- c) **Corrupt practice** means the offering, giving, receiving or soliciting of anything of value to influence the action of the employer or his staff or agents in the tender process; and
- d) **Fraudulent practice** means the misrepresentation of the facts in order to influence the tender process or the award of a contract arising from a tender offer to the detriment of the employer, including collusive practices intended to establish prices at artificial levels

- e) **organization** means a company, firm, enterprise, association or other legal entity, whether incorporated or not, or a public body
- f) **Quality (functionality)** means the totality of features and characteristics of a product or service that bear on its ability to satisfy stated or implied needs

### **Communication and employer's agent**

- Each communication between the employer and a tenderer shall be to or from the Employer or the employer's agent only, and in a form that can be read, copied and recorded. Writing shall be in the English language. The employer shall not take any responsibility for non-receipt of communications from or by a tenderer. The name and contact details of the employer's agent shall be stated at the time of appointment.

### **The employer's right to accept or reject any tender offer**

- The employer may accept or reject any variation, deviation, tender offer, or alternative tender offer, and may cancel the tender process and reject all tender offers at any time before the formation of a contract. The employer shall not accept or incur any liability to a tenderer for such cancellation and rejection.

## **Procurement procedures**

### **General**

All responsive tenderers, or not less than three responsive tenderers that are highest ranked in terms of the evaluation method and evaluation criteria stated in the tender data, **may** be invited in each round to enter into competitive negotiations, based on the principle of equal treatment and keeping confidential the proposed solutions and associated information.

At the conclusion of each round of negotiations, tenderers **may** be invited by the employer to make a fresh tender offer, based on the same evaluation criteria, with or without adjusted weightings. Tenderers will be advised accordingly when they are to submit their best and final offer.

The contract shall be awarded when the evaluation was done by the panel of not less than three persons and the Employer has the submitted best and final offer.

The employer shall evaluate tenders received during in terms of the method of evaluation stated in the Fee proposal data, and award the contract in terms of these conditions of tender.

### **Tenderer's obligations**

#### **Eligibility**

Submit a tender offer only if the tenderer satisfies the criteria stated in the Fee proposal data and the tenderer, or any of his principals, is not under any restriction to do business with employer.



Notify the employer of any proposed material change in the capabilities or formation of the tendering entity (or both) or any other criteria which formed part of the qualifying requirements used by the employer as the basis in a prior process to invite the tenderer to submit a tender offer and obtain the employer's written approval to do so prior to the closing time for tenders.

### **Cost of tendering**

Accept that the employer will not compensate the tenderer for any costs incurred in the preparation and submission of a tender offer, including the costs of any testing necessary to demonstrate that aspects of the offer satisfy requirements.

### **Check documents**

Check the tender documents on receipt for completeness and notify the employer of any discrepancy or omission.

### **Confidentiality and copyright of documents**

Treat as confidential all matters arising in connection with the tender. Use and copy the documents issued by the employer only for the purpose of preparing and submitting a tender offer in response to the invitation.

### **Reference documents**

Obtain, as necessary for submitting a tender offer, copies of the latest versions of standards, specifications, conditions of contract and other publications, which are not attached but which are incorporated into the tender documents by reference.

### **Acknowledge addenda**

Acknowledge receipt of addenda to the tender documents, which the employer may issue, and if necessary, apply for an extension to the closing time stated in the Fee proposal data, in order to take the addenda into account.

### **Clarification meeting**

N/A

### **Seek clarification**

Request clarification of the Fee proposal documents, if necessary, by notifying the employer at least ONE working day before the closing time stated in the tender data.

### **Insurance**

Be aware that the extent of insurance to be provided by the employer (if any) may not be for the full cover required in terms of the conditions of contract identified in the contract data. The tenderer is advised to seek qualified advice regarding insurance and to ensure that he or she is adequately covered for the duration of the project.

### **Pricing the tender offer**

Include in the rates, prices, and the tendered total of the prices (if any) all duties, taxes (except Value Added Tax (VAT), and other levies payable by the successful tenderer'.

Show VAT payable by the employer separately as an addition to the tendered total of the prices.

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 identified in the contract data.

State the rates and prices in Rand unless instructed otherwise in the tender data. The conditions of contract identified in the contract data may provide for part payment in other currencies.

### **Alterations to documents**

Not make any alterations or additions to the tender documents, except to comply with instructions issued by the employer, or necessary to correct errors made by the tenderer. All signatories to the tender offer shall initial all such alterations. Erasures and the use of masking fluid are prohibited.

### **Alternative tender offers**

Unless otherwise stated in the tender data, submit alternative tender offers only if a main tender offer, strictly in accordance with all the requirements of the tender documents, is also submitted as well as a schedule that compares the requirements of the tender documents with the alternative requirements that are proposed.

Accept that an alternative tender offer may be based only on the criteria stated in the Fee proposal data or criteria otherwise acceptable to the employer.

### **Submitting a tender offer**

Submit one tender offer only, either as a single tendering entity to provide the whole of the works, services or supply identified in the contract data and described in the scope of works, unless stated otherwise in the tender data.

Return all returnable documents to the employer after completing them in their entirety by writing in black ink.

Submit the parts of the tender offer communicated on paper as an original plus the number of copies stated in the tender data, with an English translation of any documentation in a language other than English, and the parts communicated electronically in the same format as they were issued by the employer.

Sign the original and all copies of the tender offer where required in terms of the tender data. The employer will hold all authorized signatories liable on behalf of the tenderer.

Seal the original and each copy, where applicable, of the tender offer as separate packages marking the packages as "ORIGINAL" and "COPY". Each package shall state on the outside the employer's address and identification details stated in the terms of reference, as well as the tenderer's name and contact address.

Seal the original tender offer and copy packages together in an outer package that states on the outside only the employer's address and identification details as stated in the Fee proposal data.

Accept that the employer shall not assume any responsibility for the misplacement or premature opening of the tender offer if the outer package is not sealed and marked as stated.

Accept that tender offers submitted by facsimile or e-mail will be rejected by the employer.

### **Information and data to be completed in all respects**

Accept that tender offers, which do not provide all the data or information requested completely and, in the form, required, may be regarded by the employer as non-responsive.

Ensure that the employer receives the tender offer at the address specified in the tender data not later than the closing time stated in the tender data. Accept that proof of posting shall not be accepted as proof of delivery.

Accept that, if the employer extends the closing time stated in the tender data for any reason, the requirements of these conditions of tender apply equally to the extended deadline.

### **Tender offer validity**

Hold the tender offer(s) valid for acceptance by the employer at any time during the validity period stated in the tender data after the closing time stated in the tender data.

If requested by the employer, consider extending the validity period stated in the tender data for an agreed additional period with or without any conditions attached to such extension.

Accept that a Fee proposal submission that has been submitted to the employer may only be withdrawn or substituted by giving the Employer or the employer's agent written notice before the closing time for tenders that a Fee proposal is to be withdrawn or substituted.

### **Clarification of tender offer after submission**

Provide clarification of a tender offer in response to a request to do so from the employer during the evaluation of tender offers. This may include providing a breakdown of rates or prices and correction of arithmetical errors by the adjustment of certain rates or item prices (or both). No change in the competitive position of tenderers or substance of the tender offer is sought, offered, or permitted.

**Note:** Clarification of the offer does not preclude the negotiation of the final terms of the contract with a preferred tenderer following a competitive selection process, should the Employer elect to do so.

### **Provide other material**

Provide, on request by the employer, any other material that has a bearing on the tender offer, the tenderer's commercial position, preferential arrangements, or samples of materials, considered necessary by the employer for the purpose of a full and fair risk assessment. Should the tenderer not provide the material, or a satisfactory reason as to why it cannot be provided, by the time for submission stated in the employer's request, the employer may regard the tender offer as nonresponsive.

Disposal of samples of materials provided for evaluation by the employer, where required.

### **Inspections, tests and analysis**

Provide access during working hours to premises for inspections, tests and analysis as provided for in the tender data.

### **Submit securities, bonds, policies, etc.**

If requested, submit for the employer's acceptance before formation of the contract, all securities, bonds, guarantees, policies and certificates of insurance required in terms of the conditions of contract identified in the contract data.

### **Check final draft**

Check the final draft of the contract provided by the employer within the time available for the employer to issue the contract.

### **Certificates**

Include in the tender submission or provide the employer with any certificates as stated in the tender data.

### **The employer's undertakings**

#### **Respond to requests from the tenderer**

Unless otherwise stated in the tender Data, respond to a request for clarification received up to two working days before the tender closing time stated in the Tender Data and notify all tenderers who drew procurement documents.

Consider any request to make a material change in the capabilities or formation of the tendering entity (or both) or any other criteria which formed part of the qualifying requirements used to prequalify a tenderer to submit a tender offer in terms of a previous procurement process and deny any such request if as a consequence:

- a) an individual firm, or a joint venture as a whole, or any individual member of the joint venture fails to meet any of the collective or individual qualifying requirements;
- b) the new partners to a joint venture were not prequalified in the first instance, either as individual firms or as another joint venture; or
- c) in the opinion of the Employer, acceptance of the material change would compromise the outcome of the prequalification process.

### **Issue Addenda**

If necessary, issue addenda that may amend or amplify the tender documents to each tenderer during the period from the date that tender documents are available until three days before the tender closing time stated in the Tender Data. If, as a result a tenderer applies for an extension to the closing time stated in the Tender Data, the Employer may grant such extension and, shall then notify all tenderers who drew documents.

#### **Return late tender offers**

Return tender offers received after the closing time stated in the Tender Data, unopened, (unless it is necessary to open a tender submission to obtain a forwarding address), to the tenderer concerned.

#### **Non-disclosure**

Not disclose to tenderers, or to any other person not officially concerned with such processes, information relating to the evaluation and comparison of tender offers, the final evaluation price and recommendations for the award of a contract, until after the award of the contract to the successful tenderer.

#### **Grounds for rejection and disqualification**

Determine whether there has been any effort by a tenderer to influence the processing of tender offers and instantly disqualify a tenderer (and his tender offer) if it is established that he engaged in corrupt or fraudulent practices.

#### **Test for responsiveness**

Determine, after opening and before detailed evaluation, whether each tender offer properly received:

- a) complies with the requirements of these Conditions of Tender,
- b) has been properly and fully completed and signed, and
- c) is responsive to the other requirements of the tender documents.

A responsive tender is one that 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 the Employer's opinion, would:

- a) detrimentally affect the scope, quality, or performance of the works, services or supply identified in the Scope of Work,
- b) significantly change the Employer's or the tenderer's risks and responsibilities under the contract, or
- c) affect the competitive position of other tenderers presenting responsive tenders, if it were to be rectified.

Reject a non-responsive tender offer, and not allow it to be subsequently made responsive by correction or withdrawal of the non-conforming deviation or reservation.

#### **Arithmetical errors, omissions and discrepancies**

Check responsive tenders for discrepancies between amounts in words and amounts in figures. Where there is a discrepancy between the amounts in figures and the amount in words, the amount in words shall govern.

Check the highest ranked tender or tenderer with the highest number of tender evaluation points after the evaluation of tender offers:

- a) the gross misplacement of the decimal point in any unit rate;
- b) omissions made in completing the pricing schedule or bills of quantities;
- or c) arithmetic errors in:
  - i) line item totals resulting from the product of a unit rate and a quantity in bills of quantities or schedules of prices; or
  - ii) the summation of the prices.

Notify the tenderer of all errors or omissions that are identified in the tender offer and either confirm the tender offer as tendered or accept the corrected total of prices.

Where the tenderer elects to confirm the tender offer as tendered, correct the errors as follows:

- a) If bills of quantities or pricing schedules apply and there is an error in the line item total resulting from the product of the unit rate and the quantity, the line item total shall govern and the rate shall be corrected. Where there is an obviously gross misplacement of the decimal point in the unit rate, the line item total as quoted shall govern, and the unit rate shall be corrected.
- b) 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 tenderer's addition of prices, the total of the prices shall govern and the tenderer will be asked to revise selected item prices (and their rates if bills of quantities apply) to achieve the tendered total of the prices.

### **Clarification of a tender offer**

Obtain clarification from a tenderer on any matter that could give rise to ambiguity in a contract arising from the tender offer.

### **General**

Appoint an evaluation panel of not less than three persons. Reduce each responsive tender offer to a comparative offer and evaluate them using the tender evaluation methods and associated evaluation criteria and weightings that are specified in the tender data:

### **Acceptance of tender offer**

Accept the tender offer, if in the opinion of the employer, it does not present any unacceptable commercial risk and only if the tenderer:

- a) is not under restrictions, or has principals who are under restrictions, preventing participating in the employer's procurement,
- b) can, as necessary and in relation to the proposed contract, demonstrate that he or she possesses the professional and technical qualifications, professional and technical competence, financial resources, equipment and other physical facilities, managerial capability, reliability, experience and reputation, expertise, and the personnel, to perform the contract,
- c) has the legal capacity to enter into the contract?
- d) is not insolvent, in receivership, bankrupt or being wound up, has his affairs administered by a court or a judicial officer, has suspended his

- business activities, or is subject to legal proceedings in respect of any of the foregoing,
- e) complies with the legal requirements, if any, stated in the tender data, and
- f) is able, in the opinion of the employer, to perform the contract free of conflicts of interest.

#### **Prepare contract documents.**

If necessary, revise documents that shall form part of the contract and that were issued by the employer. as part of the tender documents to take account of:

- a) addenda issued during the tender period,
- b) inclusion of some of the returnable documents, and
- c) other revisions agreed between the employer and the successful tenderer.

Complete the schedule of deviations attached to the form of offer and acceptance, if any.

#### **Complete adjudicator's contract**

Unless alternative arrangements have been agreed or otherwise provided for in the contract, arrange for both parties to complete formalities for appointing the selected adjudicator at the same time as the main contract is signed.

#### **Provide copies of the contracts**

Provide to the successful tenderer the number of copies stated in the Tender Data of the signed copy of the contract as soon as possible after completion and signing of the form of offer and acceptance.