



TENDER NO: 2021/052 (A)

**Supply, Design, Modification, Fabrication, Construction and Commissioning of a Semi- Panel Trailer for use as a “Walkthrough” Classroom for Environmental Education**

**VOLUME 1 – Tendering Procedures and Returnable Documents**

**Issued by:**

Umgeni Water  
310 Burger Street  
Pietermaritzburg

**Tender Queries:**

Contact Name: Sphamandla Mthembu  
Telephone: 033 341 1325

**Name of Tenderer:** \_\_\_\_\_

**National Treasury CSD Number:** \_\_\_\_\_

Tip-Offs Anonymous Hotline:	Appeals/Objections
<p>Report unethical conduct at Umgeni Water on:</p> <p>Toll Free Number: 0800 864 463 Email: <a href="mailto:umgeniwater@whistleblowing.co.za">umgeniwater@whistleblowing.co.za</a> Toll Free Fax: 0800 212 655 Postal: Freeport KZN665, Musgrave, 4062 SMS: 33490 Online: <a href="http://www.whistleblowing.co.za">www.whistleblowing.co.za</a></p> <p><i>Stop theft / fraud / dishonesty / bribery /blackmail / intimidation, and remain anonymous.</i></p>	<p>Persons aggrieved by tender award decisions taken by Umgeni Water, may lodge an appeal within <b>7 days</b> of the date of the intention to award advertisement.</p> <p>UW shall only consider written appeals/objections clearly stating reasons for appeal directed to:</p> <p>The Supply Chain Management Office, Attention: Supply Chain Management Email: <a href="mailto:appeals@umgeni.co.za">appeals@umgeni.co.za</a></p>

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**Tender Number:** 2021/052(A)

**Tender Title:** (Supply, Design, Modification, Fabrication, Construction and Commissioning of a Semi- Panel Trailer for use as a “Walkthrough” Classroom for Environmental Education)

### T1.1 TENDER NOTICE AND INVITATION TO TENDER

Umgeni Water is a state owned business enterprise that operates within the South African legislative parameters. The primary function of Umgeni Water is to supply treated water in bulk to its municipal customers.

Competent and experienced Contractors are invited to Tender for the following:

Supply, Design, Modification, Fabrication, Construction and Commissioning of a Semi- Panel Trailer for use as a “Walkthrough” Classroom for Environmental Education

In addition to the Eligibility Criteria specified in Clause F2.1 of the tender document, tenderers are required to fulfil the following:

Association affiliation of:

MIB – Manufacturer Importer Builder (to be registered with department of transport (Compulsory).

SAVABA - South African Vehicle Association and Body Builders Association (Compulsory)

NRCS – National Regulator of Compulsory Specifications (Compulsory).

RMI - Retail Motor Industry (Compulsory)

ISO 9001 Accreditation (Optional)

In addition to the evaluation criteria specified in clause F2.1 of the Tender document, Tenderers' are required to achieve a stipulated minimum threshold per designated sectors and products

Industry/sector/sub-sector	Minimum threshold for local content
Electrical and telecom cables	90%
Steel products and components for construction	100%

Tenderers are required to achieve at least 35% Contract Participation Goals (CPG) including a minimum 10% Black Women participation and another 10% for Local participation of the value of goods, services and works paid to one or more Enterprises (CPG Partner/s) as agreed with Umgeni Water before contract award. Tenderers who are the main contractor (irrespective of BBBEE classification) are not exempt from this requirement and are still required to have a CPG Partner.

### The tender will be evaluated on the two stage envelope system

The tender will firstly be evaluated on eligibility. If found to be eligible, it will be further evaluated on:

### Envelope 1: Consists of Two Phases

#### Phase 1:

A – Functionality requirements

B - Technical evaluation of a conceptual design report

Phase 1 will be evaluated and should the bidders achieve a minimum score of 57 points out of 80, bidders will proceed to phase 2 where a presentation of a 3D model for the semi panel trailer will be done.

## Phase 2:

C: Presentation of a 3D conceptual model of the semi-panel trailer.

The total minimum required scores of phase 1 (57/80) and phase 2 (15/20) will be combined and should the bidder achieve a total score of 72/100, the financial proposal document will be evaluated.

## Envelope 2: Financial proposal

- Price & Preference using the 80/20 Preference Point Scoring System in terms of PPPFA

## Instructions for accessing and for the submission of tender documents:

### Tender Submission

The physical address for and the submission of Tenders is:

**Umgeni Water, 310 Burger Street, Pietermaritzburg.**

### How to Access Tender documents

Tender documents are available from the Supply Chain Management Office. Documents will be issued by email, upon request and submission of proof of payment to [spha.mthembu@umgeni.co.za](mailto:spha.mthembu@umgeni.co.za). Documents will only be issued in electronic format, during working hours from 09h00 to 15h00 from 25 July 2022 to 05 August 2022.

### Tender documents shall only be collected during the said period and hours.

A non-refundable tender fee of R200 payable by Electronic Fund Transfer before collecting the Tender Document. Proof of EFT payment is to be provided on collection. The said transfers may be made to:

BANK NAME: NEDBANK LIMITED  
ACCOUNT NAME: UMGENI WATER BOARD – MAIN ACCOUNT  
ACCOUNT NUMBER: 1196366594  
REFERENCE: TENDER NO. 2021/052(A) and Company Name.

**NOTE: 1 TENDER DOCUMENTS SHALL NOT BE ISSUED IF INCORRECTLY REFERENCED.**

**2 TENDERER TO FORWARD NOTIFICATION OF PAYMENT BY E-MAIL TO /Mr Sphamandla Mthembu / AT [spha.mthembu@umgeni.co.za](mailto:spha.mthembu@umgeni.co.za).]**

**NOTE: NO CASH PAYMENT WILL BE ACCEPTED WHEN ISSUING TENDER DOCUMENTS.**

Queries relating to the issue of these documents shall be addressed to: Mr Sphamandla Mthembu, Tel No.: 033 341 1325, e-mail: [spha.mthembu@umgeni.co.za](mailto:spha.mthembu@umgeni.co.za).

A compulsory clarification meeting with representatives of Umgeni Water will take place via Microsoft Teams on the 12 August 2022 at 10h00.

The closing time for submission of Tenders is **12h00 on 29 August 2022.**

Tenders are to be deposited in the Tender Box located outside the main entrance at **Umgeni Water, 310 Burger Street, Pietermaritzburg.**

*Umgeni Water's Standard Conditions of Tender are available on Umgeni Water's website [https://www.umgeni.co.za/pdf/cm009\\_standard\\_conditions\\_of\\_tender.pdf](https://www.umgeni.co.za/pdf/cm009_standard_conditions_of_tender.pdf)*

*Persons aggrieved by decisions or actions taken by Umgeni Water, may lodge an appeal within 7 days of the date of the intention to award advertisement appearing in the relevant print media.*

T1.3.

*The appeal (clearly stating reasons for appeal) and queries with regard to the decision of award are to be directed, in writing only to the Supply Chain Management Office,  
Attention: Supply Chain Management  
Email: [appeals@umgeni.co.za](mailto:appeals@umgeni.co.za)*

*Note that appeals not addressed to the abovementioned e-mail address will not be considered.*

*For any other Tender adverts, please visit this website.*

***Umgeni Water Reserves the Right to Award the Contract In Whole or In Part, or not at all.***

**DRAFT**

## T1.2 TENDER DATA (INCLUDING SPECIAL CONDITIONS OF TENDER)

The general conditions of tender are the Umgeni Water Standard Conditions of Tender (document number: SCM009, a copy of which may be obtained from Umgeni Water Supply Chain Management office or can be downloaded from the following website:

[https://www.umgeni.co.za/pdf/cm009\\_standard\\_conditions\\_of\\_tender.pdf](https://www.umgeni.co.za/pdf/cm009_standard_conditions_of_tender.pdf)

For purposes of this Contract the following Special Conditions of Tender shall apply:

### F.3.8 Test for responsiveness

Sub-Clause F.3.8.1 Add the following new sub-clause:

“d) meets the minimum Functionality requirements stated in the Tender Data.”

### F3.11.3 Method 2: Functionality, Price and Preference

#### Functionality

Each member of the Employer's tender evaluation committee is to independently score each tender in respect of functionality offered in accordance with the provisions of F.3.11.9. The committee is then to calculate the final score for each tender as the average of the score from each committee member, rejecting all tender offers that fail to score the minimum number of points stated in the tender data, if any.”

The Standard Conditions of Tender make several references to the Tender Data for details that apply specifically to this tender. The Tender Data shall have precedence in the interpretation 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
	<b>F.1.1 Actions</b>
F.1.1	The Employer is Umgeni Water
	<b>F.1.2 Tender Documents</b>
F.1.2	<p>The Tender Documents issued by the Employer comprise the following documents:</p> <p><b>VOLUME 1 – Tendering Procedures and Returnable Documents</b></p> <p><b>Part T1: Tendering procedures</b></p> <p>T1.1 Tender Notice and invitation to Tender</p> <p>T1.3 Tender Data</p> <p><b>Part T2: Returnable Schedules and Documents</b></p> <p>T2.1 List of all Returnable Documents</p> <p>T2.3 Returnable Schedules</p> <p><b>VOLUME 2 – Offer, Contract and Price [Note to compiler: Correct this title if volume 3 is not used. Delete this note]</b></p> <p><b>Part C1: Agreements and Contract Data</b></p> <p>C1.2 Form of Offer, Acceptance and Schedule Deviations</p> <p>C1.8 Contract Data</p> <p>C1.17 Form of Guarantee</p> <p><b>Part C2: Pricing data</b></p> <p>C2.2 Pricing Instructions</p> <p>C2.2 Pricing Schedule</p> <p><b>VOLUME 3 – Scope of Work, Site Information and Annexures</b></p>

	<p><b>Part C3: Scope of work</b> C3.1 Scope of Work</p> <p><b>Part C4: Site Information</b> C4.1 Site Information</p> <p><b>Part C5: Annexures</b></p> <p>The Tender Document and the drawings shall be obtained from the Employer or its authorized representative at the physical address stated in the Tender Notice, upon payment of the deposit stated in the Tender Notice. Upon receipt of the Tender documents and prior to the submission of any Tender, the Tenderer shall check the documents issued and the number of pages contained in each document and if any are found to be missing or duplicated or any figure or wording indistinct, the Tenderer shall apply to the Employer's Agent at once to have the same rectified as no liability will be entertained by the Employer or the Employer's Agent in respect of errors in any Tender arising out of any matter referred to in this paragraph. The Tenderer is required to satisfy itself that the Documents received are correct, complete and sufficient to be the basis of a <i>bona fide</i> Tender in every respect.</p> <p>Should any Tenderer not accept that the Documents issued can form the basis of a <i>bona fide</i> Tender, the Employer's Agent shall be requested to correct the discrepancy, ambiguity, missing or illegible information, failing which the Tender submitted by the Tenderer shall be taken that the Tenderer accepts the adequacy of the Tender document.</p> <p>The submission of a <i>bona fide</i> Tender shall absolve the Employer's Agent from any liability whatsoever for any error in a Tender due to the foregoing.</p>								
<b>F.1.4 Communication and Employer's agent</b>									
F.1.4	<p>The Employer's buyer is: <b><u>Tender Queries</u></b></p> <table border="1"> <tr> <td>Name:</td><td>Sphamandla Mthembu</td></tr> <tr> <td>Address:</td><td>310 Burger Street Pietermaritzburg 3200</td></tr> <tr> <td>Tel:</td><td>033 341 1325</td></tr> <tr> <td>E-mail:</td><td>spha.mthembu@umgeni.co.za</td></tr> </table>	Name:	Sphamandla Mthembu	Address:	310 Burger Street Pietermaritzburg 3200	Tel:	033 341 1325	E-mail:	spha.mthembu@umgeni.co.za
Name:	Sphamandla Mthembu								
Address:	310 Burger Street Pietermaritzburg 3200								
Tel:	033 341 1325								
E-mail:	spha.mthembu@umgeni.co.za								
<b>F.2.1 Eligibility</b>									
F.2.1	<p>Umgeni Water will only consider submissions from tenderers who satisfy the following criteria:</p> <ol style="list-style-type: none"> <li>The tenderer completed the Bidders Disclosure Form (T2.2.2)</li> <li>Tenderers are required to achieve the stipulated minimum threshold of 90% electrical and telecom cables as per the relevant Treasury Instruction Note on local content and production. (Refer to Returnable Document T2.2.8)</li> <li>Tenderers are required to achieve at least 35% Contract Participation Goals (CPG) including a minimum 10% Black Women participation and another 10% for Local participation of the value of goods, services and Works paid to one or more Enterprises (CPG Partner/s) as agreed with Umgeni Water before contract award. Tenderers who are the main contractor (irrespective of BBBEE classification) are not exempt from this requirement and are still required to have a CPG Partner.</li> <li>Trailer Manufacturer Competency List <ul style="list-style-type: none"> <li>Qualified trade tested vehicle body builders/artisans/boiler makers</li> <li>Qualified trade tested welders</li> </ul> </li> </ol>								

	<p><b>Affiliation to Regulatory Bodies such as:</b></p> <ul style="list-style-type: none"> <li>• ISO 9001 Accreditation (Optional)</li> <li>• RMI – Retail Motor Industry [Compulsory]</li> <li>• MIB – Manufacturer Importer Builder (to be registered with department of transport) [Compulsory]</li> <li>• NRCS – National Regulator of Compulsory Specifications [Compulsory]</li> <li>• SAVABA – South African Vehicle Association and Body Builders Association [Compulsory].</li> </ul>
	<b>F.2.7 Clarification meeting</b>
F.2.7	There shall be a compulsory clarification meeting. The details for which are stated in the Tender Notice and Invitation to Tender.
	<b>F.2.12 Alternative Tender offers</b>
F.2.12	No alternative Tender offers will be considered.
	<b>F.2.13 Submitting a Tender offer</b>
F.2.13.3	Parts of each Tender offer communicated on paper shall be submitted as an original.
F.2.13.5 and F.2.13.7	<p>The Employer's details and address for delivery of Tender offers are stated in T1.1 <b>Tender Notice and Invitation to Tender.</b></p> <p><b>Identification details</b> The identification details which must be stated in the Tender offer outer package are:  <b>Tender Number</b>  <b>Title of Tender</b>  <b>Closing Date</b>  <b>Closing Time</b>  <b>Tenderer's Name</b>  <b>Tenderer's Address</b></p> <p>Tenders issued in more than one volume must be returned in the same manner and bound separately as per the Tender volumes issued.</p> <p><i>The Tender box is available to the public 24 hours per day and 7 days per week. It is the Tenderer's sole responsibility to ensure that Tenders are placed in the Tender box and only Tenders that have been placed in the Tender box before the stipulated closing date and time will be considered</i></p>
	<b>F2.13.6 Two Envelope tender Procedure</b>
F.2.13.6	<p>This tender will be based on a two envelope bidding process. The two envelope system is a bidding process that consists of two elements wherein Envelope 1, contains the functionality and technical submission and Envelope 2 contains the financial proposal submission. The functionality/technical evaluation will be conducted in two phases. Phase 1 will evaluate the functionality criteria and technical proposal which includes a conceptual design report followed by Phase 2 which will comprise of a presentation by the bidders that will include a conceptual 3D model of the semi-panel trailer. The functionality criteria, technical proposal (envelope 1) and financial offer are submitted in separate envelopes at the same place and time. Only the functional/technical Envelope 1 submitted by each interested bidder will be opened at the bid opening. The unopened envelope containing the</p>



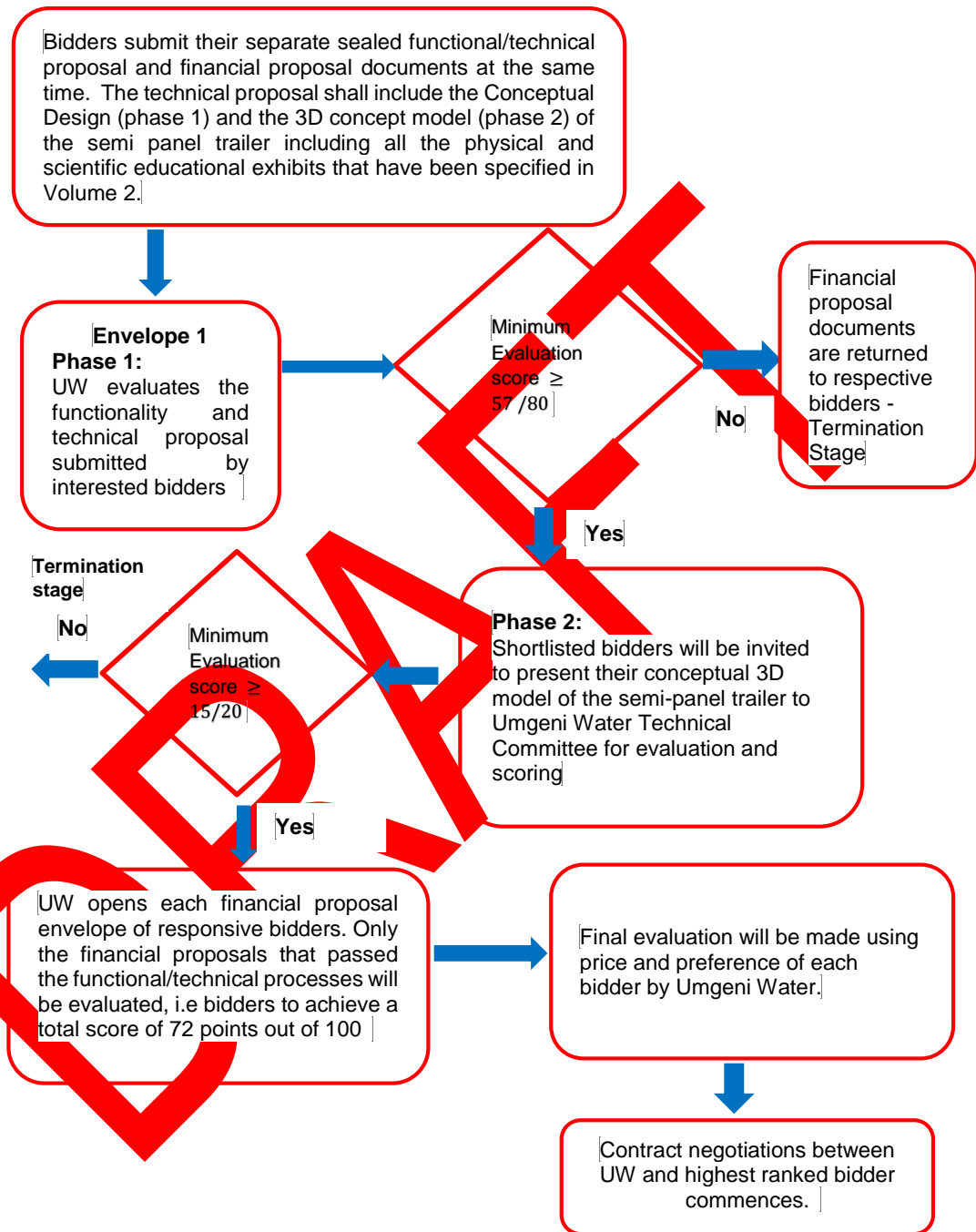
financial proposal shall be stamped and endorsed with the openings official's signature and will be retained by him/her for safekeeping.

The financial offers/bid documents of responsive bidders will only be opened once the functional/technical proposals have been evaluated. Responsive technical proposals refers to proposals meeting the minimum acceptance scores obtained during the functional/technical proposal evaluation by Umgeni Water ( $\geq 72$  points – *phase 1 score plus phase 2 score*). The financial offer for the envelopes of the non-responsive technical proposals will be returned to bidders unopened along with the notification of the decision of the Bid Evaluation Committee.

When required the financial offers/bids corresponding to responsive functional/technical proposals, shall be opened by the opening official in accordance with the requirements of Bid Opening procedure.

After being recorded in the bid opening record, the bids/technical proposals shall be handed over to the official responsible for the supervision of the processing thereof and that official shall acknowledge receipt thereof by signing the bid opening record.

Figure 1 shows a summary flow diagram for the two envelope bidding process



	<b>F.2.15 Closing time</b>
F.2.15	The closing time for submission of Tender offers is as stated in <b>T.1.1 Tender Notice and Invitation to Tender.</b>
	<b>F.2.16 Tender offer validity</b>
F.2.16.1	The Tender offer validity period is 120 days from the closing date.
	<b>F.2.19 Inspections, tests and analysis</b>
F.2.19	Access shall be provided for the following inspections, tests and analysis:  <i>There will be an inspection of the quality of work based on the final design of the modified semi-panel trailer. This will include the correct functionality of the semi-panel trailer as per the scope of work requirements (hydraulic floor and retractable awning expansion). In addition, this must also include the correct installation and functioning of all the educational exhibits, diesel generator and ablution facility that is located inside the semi-panel trailer.</i>
	<b>F.2.20 Submit securities, bonds, policies, etc.</b>
F.2.20	The Tenderer is required to submit with his Tender a letter of intent from an approved financial institution registered with the Financial Services Board undertaking to provide the PERFORMANCE GUARANTEE - DEMAND GUARANTEE to the format included in Part T2.2 of this procurement document.
	<b>F.2.23 Certificates</b>
F.2.23	The Tenderer is required to submit with his Tender: <ol style="list-style-type: none"> <li>1) A Tax Compliance Status letter (with pin) issued by the South African Revenue Services.</li> <li>2) Central Supplier Database (CSD) Report</li> <li>3) Proof of good standing in terms of the COID Act</li> <li>4) Valid affidavit or certified copy of B-BBEE Status Level Certificate or sufficient evidence to confirm status as a qualifying EME</li> <li>5) Company Registration Certificate</li> </ol>
	<b>F.3.4 Opening of Tender submissions</b>
F.3.4	Tenders will be opened immediately after the closing time for Tenders as stipulated in T1.1 Tender Notice and Invitation to Tender.
	<b>F3.8 Test for responsiveness</b>
F.3.8	The minimum qualifying functionality evaluation score for phase 1 shall be fifty-seven points (57) points out of eighty (80) points to proceed to phase two of the functionality evaluation (i.e, the presentation of the 3D model for the semi-panel trailer) stage.  The minimum qualifying functionality evaluation score for phase 2 shall be fifteen (15) points out of twenty (20) points. This gives a total of seventy-two (72) points out of a one hundred points (100). Should the bidder/s achieve this final total score, then only will their financial proposal documents be opened.
	<b>F.3.11 Evaluation of Tender offers</b>
F.3.11.3	The procedure for the evaluation of responsive tenders is Method 2(Functionality, Price and Preference)

BSC [ 527 ]    Item [ 8.6 ]

- The bidders financial proposal documents will only be evaluated if they achieve a total minimum score of 72 points in the functionality phase.

The table below shows the summary of the minimum and maximum score requirements that is required for phase one (i.e – the technical proposal submission): These scores will be used to assess the bidders that reach phase 2 of the tender process.

Evaluation Criteria For the Functionality and Technical Proposal Submission of Phase 1	Minimum Acceptance Score to Pass Phase 1	Maximum Points
<b>A: Functionality Evaluation:</b>		
Tenderer's Experience	7	10
Experience of Key Personnel	7	10
Quality Assurance and Environmental Management	7	10
Method Statement	11	15
Preliminary Programme	7	10
<b>B: Technical Proposal:</b>		
Conceptual Design Report	18	25
<b>Total Minimum Score Required by Bidders to Proceed to Phase Two</b>	<b>57</b>	<b>80</b>

Phase Two – Bidders that meet the minimum criteria of 57 points stipulated in phase 1 will be invited to present their conceptual 3D model of the semi- panel trailer.

Refer to section T2.2.14a.

Evaluation Criteria For the 3D model Presentation of Phase 2	Minimum Acceptance Score	Maximum Points
3D Model Presentation of the Semi-Panel Trailer	15	20

Failure to score the minimum acceptance score that is stipulated in all of the criteria listed above will deem the bid to be non-responsive and the bidder will be disqualified.

The score allocated by each Bid Evaluation Committee member for a tender shall be the sum, of the scores relevant to each of the above listed returnable schedules multiplied by the percentage weighting for each as shown above.

### F.3.17 Provide copies of the contracts

F.3.17 The number of paper copies of the signed contract to be provided by the Employer is one (1).

### F3.18 Provide written reasons for actions taken

F3.18 Appeals Process

Persons aggrieved by decisions or actions taken by Umgeni Water, may lodge an appeal within 7 days of the date of the intention to award advertisement appearing in the relevant print media.

The appeal (clearly stating reasons for appeal) and queries with regard to the decision of award are to be directed, in writing only to the Supply Chain Management Office,  
Attention: Supply Chain Management  
Email: [appeals@umgeni.co.za](mailto:appeals@umgeni.co.za)

Note that appeals not addressed to the abovementioned email will not be considered.

T1.12.

	<b><i>Umgeni Water Reserves The Right To Award The Contract In Whole Or In Part, or not at all.</i></b>
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T2.1.

**T2.1 LIST OF ALL RETURNABLE DOCUMENTS AND SCHEDULES**

The Tenderer shall complete and submit the following returnable schedules and documents:

	Tenderer's Check List	Page No.
T2.2.1 Authority for Signatory		T2.3
T2.2.2 Bidders Disclosure		T2.10
T2.2.3 Tax Compliance Status Letter Requirements or CSD Report		T2.13
T2.2.4 Proof of Attendance at the Compulsory Clarification/Site Meeting		T2.15
T2.2.5 Contract Participation Goals (CPG)		T2.16
T2.2.6 Tenderer's Experience		T2.19
T2.2.7 Key Personnel Assigned to the Work	N/A	T2.22
T2.2.8 Local Production and Content Declaration Certificate (SBD 6.2)		[T2.23]
T2.2.9 Experience of Key Personnel		T2.30
T2.2.10 Proposed Organization and Staffing		T2.33
T2.2.11 Tenderer's Schedule of Plant and Equipment	N/A	T2.35
T2.2.12 Quality Assurance and Environmental Management		T2.36
T2.2.13 Method Statement		T2.38
T2.2.14 Preliminary Programme		T2.40
T2.2.14a Conceptual Design Report Submission		
T2.2.15 Registration Certificate / Agreement / ID Document		T2.42
T2.2.16 Amendments, Qualifications and Alternatives	N/A	T2.43
T2.2.17 Record of Addenda to Tender Documents		T2.45
T2.2.18 VAT Registration Certificate		T2.46
T2.2.19 Schedule of Proposed Sub-Contractors		T2.47
T2.2.20 Proof of Purchase of Tender Document		T2.48
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T2.2.22 Preference Points claim form in terms of the PPPFA Regulations 2017, substantiated by the B-BBEE Verified Status Level Verification Certificate		[T2.52]
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T2.2.28 Letter of Intent for Performance Guarantee		T2.65
T2.2.29 Registration Certificates		T2.66
T2.2.30 Central Supplier Database (CSD) Report		T2.67

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T2.1.

## T2.2.1 AUTHORITY FOR SIGNATORY

*Fill in the relevant portion applicable to the type of organization*

### A. COMPANIES

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

#### AUTHORITY BY BOARD OF DIRECTORS

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

Mr/Mrs ..... (whose signature appears below) has  
been duly authorized to sign all documents in connection with this Tender on behalf of

(Name of Company) .....

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

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

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

WITNESSES: .....

T2.1.

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

I, the undersigned .....

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

.....

.....  
**SIGNATURE**

.....  
**DATE**

**DRAFT**

T2.1.

## 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 partners in the business trading as .....

hereby authorize .....  
to sign this Tender as well as any contract resulting from the Tender and any other documents and correspondence in  
connection with this Tender and /or contract on behalf of

.....  
Signature Signature Signature

.....  
Date Date Date

T2.1.

#### D. CLOSE CORPORATION

In the case of a close corporation submitting a Tender, a certified copy of the Founding Statement of such corporation shall be included with the Tender, together with the resolution by its members authorizing 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/Ms ....., whose signature appears below, has been authorized to sign all documents in connection with this Tender 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. ....

T2.1.

## E. CO-OPERATIVE

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

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

at .....

Mr/Ms ....., whose signature appears below, has been authorized to sign all documents in connection with this Tender on behalf of (Name of Co-Operative) .....

.....

### SIGNATURE OF AUTHORIZED REPRESENTATIVE/SIGNATORY:

(PRINT NAME) .....

IN HIS/HER CAPACITY AS .....

DATE: .....

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

NAME IN BLOCK LETTERS: .....

WITNESSES: 1. ....

2. ....

T2.1.

## F. JOINT VENTURE

If a tenderer 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 tender to do so, as well as to sign any contract resulting from this tender and any other documents and correspondence in connection with the tender and/or contract on behalf of the joint venture must be submitted with this tender, before the closing time and date of the tender.

Authority to sign on behalf of the Joint Venture:

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

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

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

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

Signed on behalf of (COMPANY NAME): .....  
(PRINT NAME)

Signature ..... Date: .....

T2.1.

## G. CONSORTIUM

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

Authority to sign on behalf of the consortium:

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

Mr/Mrs ..... ,  
(whose signature appears below) have been duly authorised to sign all documents in connection with this tender on behalf of:

(Name of Consortium) .....

In his/her capacity as: .....

Signature ..... Date: .....

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T2.1.

## T2.2.2 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**

2.3.1 If so, furnish particulars:

.....

<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.



### 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.
- 3.4 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.
- 3.5 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.
- 3.6 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.

<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.

T2.1.

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

DRAFT

### T2.2.3 TAX COMPLIANCE STATUS LETTER REQUIREMENTS

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

- Bidders must ensure compliance with their tax obligations.
- 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.
- Application for Tax Compliance Status (TCS) pin may be made via e-filing through the SARS website [www.sars.gov.za](http://www.sars.gov.za).
- Bidders may also submit a printed TCS certificate together with the bid.
- In bids where consortia / joint ventures / sub-contractors are involved, each party must submit a separate TCS certificate / pin / CSD number.
- Where no TCS is available but the bidder is registered on the Central Supplier Database (CSD), a CSD number must be provided.
- 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 in the service of the state.

DRAFT

T2.1.

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**T2.2.3 TAX COMPLIANCE STATUS LETTER REQUIREMENTS (Continued.....)**

**[Tax Compliance Status (TCS) Letter *obtained from SARS to be inserted here*]**

**DRAFT**

T2.1.

**T2.2.4 PROOF OF ATTENDANCE AT THE COMPULSORY CLARIFICATION / SITE MEETING**

**CERTIFICATE OF ATTENDANCE**

TENDER No. 2021/052(A)

This is to certify that

(Tenderer) .....

of (address) .....

.....

.....

was represented by the person(s) named below at the compulsory meeting held for all Tenderers at (location)

..... on (date) .....

starting at (time) .....

I / We acknowledge that the purpose of the meeting was to acquaint myself / ourselves with the site of the works and / or matters incidental to doing the work specified in the Tender documents in order for me / us to take account of everything necessary when compiling our rates and prices included in the Tender.

**Particulars of person(s) attending the meeting:**

Name: ..... Signature: .....

Capacity: .....

Name: ..... Signature: .....

Capacity: .....

**Attendance of the above person(s) at the meeting is confirmed by the Purchaser's representative, namely:**

Name: ..... Signature: .....

Capacity: ..... Date and Time: .....

## T2.2.5 CONTRACT PARTICIPATION GOALS

### Objective

The objective of Umgeni Water's empowerment initiative is to bring about meaningful transformation in all procurement projects and in particular in the built environment / construction and consulting industry through achieving one or more of the following objectives:

- Meaningful Economic Participation;
- Local Economic Development;
- Transfer of Technical, Management and Entrepreneurial Skills; and
- Creation of sustainable Black Enterprises

### Contract Participation Goals

Contract Participation Goal (CPG) – the **final** value of services paid to the CPG Partner/s based on the **final** contract value.

At the time of awarding the contract the 35% minimum CPG amount will be based on the contract award value exclusive of the following:

- VAT, CPA and Contingencies.

During contract implementation, adjustments relating to Provisional Sums and Contingencies linked to the CPG allocation will be agreed upon between the parties to the contract, as and when the need arises.

**CPG Partner/s** – Service provider/s selected from Umgeni Water's Supply Chain Management (SCM) Enterprise Development Database.

Tenderers (the main contractor irrespective of BBBEE classification) who are on Umgeni Water's SCM Enterprise Development Database are not exempt from this requirement and are still required to have a CPG Partner.

Tenderers are required to achieve at least 35% Contract Participation Goals (CPG) including a minimum 10% Black Women participation and another 10% for Local participation and another 10% for Local participation of the value of goods, services and Works paid to one or more enterprises (CPG Partner/s)

- 35% includes any special materials
- 35% excludes VAT, CPA and Contingencies.
- The tenderer will be required to achieve the actual Rand value committed for CPG, adjusted according to the following:
  - Variation Orders – Each VO will be evaluated by the Employer's Agent and the Project Manager to determine whether it should be counted, in its entirety or partially, as part of CPG or not.
  - Re-measurable Items (including CPA, and provisional sums) – Each re-measurable item change will be evaluated by the Employer's Agent and the Project Manager to determine whether it should be counted as part of CPG or not.

Within 2 weeks of the award of contract, the tenderer will be required to submit a cash flow projection for the main contractor and the CPG Partner/s

### Applicability

The CPG target is applicable to all contracts to be adjudicated through the Umgeni Water procurement process and shall be achieved through the following mechanisms:-

- CPG Partner/s selection is concluded **after** adjudication of tenders and **before** contract award is made.
- The CPG Partner/s shall be selected according to the following criteria:
  - CPG Partner/s are to be obtained from Umgeni Water's database of suppliers specifically earmarked for CPG purposes.
  - In the event of services where Umgeni Water does not have an applicable service provider on its database, the tenderer may propose a suitable CPG Partner/s for consideration by Umgeni Water.
- Main service provider may propose a suitable CPG Partner/s, but Umgeni Water reserves the right to provide or arrange a CPG Partner/s to work with the successful company.

T2.1.

- Sub-contracting of the CPG Partner/s at the same rate / price that the tenderer would have offered to Umgeni Water whilst making profit margins consistent to the profit margins that the main contractor would have made under normal trading processes.
- Value of the work to be sub contracted shall be at least **35% (minimum of 10% shall be due to Black Women participation and another 10% for Local participation and another 10% for Local participation)** of the total contract value excluding VAT, CPA and Contingencies.
- CPA is payable to the CPG Partner/s as per the indices stipulated in the contract document.
- The work allocated to the CPG Partner shall be performed by the CPG Partner directly and may not be allocated or sub-contracted out to other contractors/consultants/service providers.
- The main contractor **shall not** substitute any CPG Partner/s without the written approval of Umgeni Water.
- The working capital arrangements between the main contractor and the CPG Partner/s must be agreed upon between the two parties prior to commencement of works to ensure that the CPG Partner does not have cash flow challenges during contract implementation.

### Invoicing and Payment

The monthly measurement and payment will be according to the following guideline:

- Submission of payment certificate to the Employer's Agent by the Contractor – by 20<sup>th</sup> of each month, or the nearest previous working day. The submission from the contractor shall include the signature of the CPG Partner indicating agreement with the measurements and rates applicable to the work undertaken by the CPG Partner.
- Submission to Umgeni Water by the Employer's Agent – by 25<sup>th</sup> of each month, or the nearest previous working day;
- Payment to the Contractor – on the last day of the following month;
- The CPG Partner must be paid within reasonable time but no later than 3 working days after the Main Contractor has been paid by Umgeni Water; and
- The submission from the Contractor must include a schedule that clearly shows the following:
  - Total Contract Sum
  - Total amount payable to CPG Partner/s excluding current month
  - Amount payable to CPG Partner for current month
  - % split of Total amount payable to Main contractor and CPG Partner/s

### Monitoring and Reporting on CPG

- Umgeni Water will monitor CPG implementation on site. This may include direct contact with CPG Partner/s on site for verification purposes.
- The CPG Partner shall be in agreement with the measurement and payment for work completed, for the purposes of submitting payment certificates, as determined by the Contractor. Should disagreements arise, Umgeni Water reserves the right to intervene to resolve the disagreement.
- CPG Partner/s shall attend all contractual meetings relevant to their scope of work including contract award negotiations, monthly contract site meetings and technical meetings.

### Eligibility Criteria

For tenders where the CPG target is applicable, those that do not offer a **minimum** CPG participation of **35%** (including minimum 10% Black Women participation and another 10% for Local participation) according to the requirements mentioned above, will be deemed **ineligible**.

T2.1.

## DECLARATION REGARDING CONTRACT PARTICIPATION GOALS

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by: **UMGENI WATER** do hereby make the following declaration and certify the statements contained herein to be true and complete in every respect:

I certify, on behalf of: \_\_\_\_\_ that:

(Name of Bidder)

1. I have read and I understand the contents of this Declaration and the fully completed bid document accompanying this declaration;
2. I understand and declare that the accompanying bid will, and must, be disqualified if this Declaration is found not to be true and complete in every respect;
3. I understand and declare that in the event that this bid is successful, I will be required to, and shall, fully implement the commitments that are submitted with this bid, in particular regarding the Bidder's contract participation goals and commitments towards the allocation of certain portion of the contract to small and emerging entities (CPG Partner/s). Failure to implement such commitments as outlined in the bid document (in particular, as detailed in the bill of quantities) and or failure to provide the relevant information within the prescribed period as determined in the Letter of Intention to Award the Bid, shall automatically disqualify this bid from further consideration and the Employer has the right to, and must, then award the bid to the next highest ranked bidder; and as a result I or the bidder or any of its directors shall have no recourse against Umgeni Water.
4. I am authorized by the bidder to sign this Declaration, and to submit the accompanying bid, on behalf of the bidder;
5. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
6. I am aware that, and do consent to, the disqualification of my or the bidder's future bids with Umgeni Water in the event that the commitments made herein are not fulfilled and that such non-fulfillment amounts to abuse of Umgeni Water's supply chain policies and procedures and/or empowerment objectives which must be penalized, over and above the contractual sanctions as agreed to in line with the contract signed with Umgeni Water, with a sanction of restricting me and or my company (the bidder) and or any of its directors from conducting business with Umgeni Water for a period not exceeding ten (10) years.
7. I consent that should my company (the Bidder) deviate from the commitments and the spirit of the CPG objectives as agreed to, shall amount to a repudiation of the contractual arrangement between the two parties (Umgeni Water and the Bidder); and Umgeni Water shall have the right to terminate the contract with immediate effect and without giving my company (the Bidder) prior notice to remedy the breach.

\_\_\_\_\_  
Full Names & Surname  
(Duly authorized)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Position

\_\_\_\_\_  
Name of Bidder



## T2.2.6 TENDERER'S EXPERIENCE

The experience of the Tenderer or joint venture partners in the case of an unincorporated joint venture or consortium will be evaluated on the basis of experience in similar projects or similar areas and conditions in relation to the scope of work.

Tenderers should very briefly describe their experience in this regard relevant to the scope of work and attach this to this schedule. Tenderers must note that the details reflected in the schedule below should have contactable references so that Umgeni Water can verify the information. If the references are not contactable the information shall not be considered for evaluation purposes.

***Note to tenderer: only information relating to similar projects is to be provided in the above table.***

***Copies of completion certificates are to be attached to the last page of this returnable. Information in the table on the next page, without attached certificates will not be considered.***

Each bidder must submit proof based on their prior technical experience on the construction of semi-panel trailers. This must include any hydraulic work or recommended method based on engineering principles in allowing for semi-panel trailer floor expansions. In addition, each bidder must provide the following:

In addition, a maximum of three traceable reference letters of affirmation from Business or Government customers to whom the project or service was delivered or a sworn affidavit to this effect. Each letter must be dated, signed and on a letterhead of the customer which indicates:

- The customer Company name and physical address;
- Customer contact person's name, telephone number and email address;
- Project (or Service) scope of work that was conducted in relevance to semi-panel trailer design and construction.
- Company's stamp and a representative signature.
- Project start and end date.

NB:

*UW reserves the right to verify the information provided*

*No points will be awarded if a bidder only provides a list of clients.*

*No points will be allocated to bidders that did not submit traceable references.*

**Umgeni Water reserves the right not to appoint a tenderer should the references generally indicate poor performance on previous projects that are reflected in the table below.**

The description should be put in tabular form with the following headings:

T2.1.

Company Name:	Company Representative Contact Details:
	Name and Surname:
	Telephone:
Company Registration Number:	Email Address:
	Job Title:
Company's Physical Address details:	Signature:
	Company Stamp:

Project Start Date: \_\_\_\_\_

Project End Date: \_\_\_\_\_

Value of Construction Work (VAT Inclusive): \_\_\_\_\_

Tenderers years of experience in semi-panel trailer manufacturing with reference to hydraulic lifting floors: \_\_\_\_\_

(provide proof of relevant experience)

Project Scope of Work (Describe the nature of the work that was conducted indicating the project activities in relation to the scope of work presented in Volume 2). Bidders must list the number of designed semi panel trailers, the length of the designed semi-panel trailers and attach copies of the reference letters with specific relation to hydraulic lifting floors and/or hydraulically operated multi-level trailers for the transport of vehicles.

Note to tenderer: only information relating to similar projects is to be provided in the above table.

Copies of completion certificates are to be attached to the last page of this returnable. Information in the table without the certificates attached will not be considered.

Scoring of the Tenderer's experience will be as follows: |

|

T2.1.

DESCRIPTION	MAX POSSIBLE SCORE	Minimum Acceptance Score
<p><i>Company's years of experience in semi-panel trailer manufacturing with specific relation to hydraulic lifting floors and/or hydraulically operated multi-level trailers for the transport of vehicles), utilising hydraulic principles or other recommended engineering methods.</i></p> <ul style="list-style-type: none"> <li>• &lt; 1 year - 1 point</li> <li>• Between 1-4 years - 2 points</li> <li>• Between 5-7 years - 3 points</li> <li>• Between 8 -10 years - 4 points</li> <li>• &gt;10 years - 5 points</li> </ul>	5	4
<p><i>Design and manufacture of (in terms of the length of semi-panel trailer) that has a relation to hydraulic lifting floors and/or hydraulically operated multi-level trailers for the transport of vehicles):</i></p> <ul style="list-style-type: none"> <li>• Semi-panel trailer length of: between 1m-5m - 1 point</li> <li>• Semi-panel trailer length of: between 5.5m-8m - 2 points</li> <li>• Semi-panel trailer length of: between 8.5m-10m - 3 points</li> <li>• Semi-panel trailer length of: 10.5m - 4 points</li> <li>• Semi-panel trailer length of: 11m-22.5m - 5 points</li> </ul> <p><i>N.B: maximum trailer length according to South African Road Regulations is 22.5m</i></p>	5	3
<p><i>Number of designed semi-panel trailers that includes relevance to hydraulic lifting floors and/or hydraulically operated multi-level trailers for the transport of vehicles), utilising hydraulics or a recommended driving mechanism (gear shaft, electrically actuated type or other):</i></p> <ul style="list-style-type: none"> <li>• One designed semi-panel trailer – 1 point</li> <li>• Two designed semi-panel trailers – 2 points</li> <li>• Three designed semi-panel trailers – 3 points</li> <li>• Four designed semi-panel trailers - 4 points</li> <li>• &gt; Four designed semi-panel trailers - 5 points</li> </ul>	5	3

T2.1.

<p><i>Bidders traceable reference letters submission (Refer to the table format above)</i></p> <ul style="list-style-type: none"> <li>• One traceable reference letter submitted – 1 point</li> <li>• Two traceable reference letters submitted – 2 points</li> <li>• Three traceable reference letters submitted – 3 points</li> <li>• Four traceable reference letters submitted – 4 points.</li> <li>• Five traceable reference letters submitted – 5 points.</li> </ul>	5	4
<b>MAXIMUM SCORE</b>	$\frac{20}{2} = 10$	$\frac{14}{2} = 7$
<b>BIDDERS SCORE</b>		

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T2.1.

## T2.2.7 KEY PERSONNEL ASSIGNED TO THE WORK

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

### KEY PERSONNEL SCHEDULE

No.	Proposed Function	Key Person Name
1.	Mechanical Engineer	
2.	Project Manager	
3.	Site Agent/Foreman	

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## T2.2.8 DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS

This Standard Bidding Document (SBD) must form part of all bids invited. It contains general information and serves as a declaration form for local content (local production and local content are used interchangeably).

Before completing this declaration, bidders must study the General Conditions, Definitions, Directives applicable in respect of Local Content as prescribed in the Preferential Procurement Regulations, 2017, the South African Bureau of Standards (SABS) approved technical specification number SATS 1286:2011 (Edition 1) and the Guidance on the Calculation of Local Content together with the Local Content Declaration Templates [Annex C (Local Content Declaration: Summary Schedule), D (Imported Content Declaration: Supporting Schedule to Annex C) and E (Local Content Declaration: Supporting Schedule to Annex C)].

### 1. General Conditions

- 1.1. Preferential Procurement Regulations, 2017 (Regulation 8) makes provision for the promotion of local production and content.
- 1.2. Regulation 8(2) prescribes that in the case of designated sectors, where in the award of bids local production and content is of critical importance, such bids must be advertised with the specific bidding condition that only locally produced goods, services or works or locally manufactured goods, with a stipulated minimum threshold for local production and content will be considered.
- 1.3. Where necessary, for bids referred to in paragraph 1.2 above, a two stage bidding process may be followed, where the first stage involves a minimum threshold for local production and content and the second stage price and B-BBEE.
- 1.4. A person awarded a contract in relation to a designated sector, may not sub-contract in such a manner that the local production and content of the overall value of the contract is reduced to below the stipulated minimum threshold.
- 1.5. The local content (LC) expressed as a percentage of the bid price must be calculated in accordance with the SABS approved technical specification number SATS 1286: 2011 as follows:

$$LC = [1 - x / y] * 100$$

Where

x is the imported content in Rand

y is the bid price in Rand excluding value added tax (VAT)

Prices referred to in the determination of x must be converted to Rand (ZAR) by using the exchange rate published by South African Reserve Bank (SARB) at 12:00 on the date of advertisement of the bid as indicated in paragraph 4.1 below.

**The SABS approved technical specification number SATS 1286:2011 is accessible on [http://www.thedti.gov.za/industrial development/ip.jsp](http://www.thedti.gov.za/industrial%20development/ip.jsp) at no cost.**

- 1.6 A bid may be disqualified if –
  - (a) this Declaration Certificate and the Annex C (Local Content Declaration: Summary Schedule) are not submitted as part of the bid documentation; and
  - (b) the bidder fails to declare that the Local Content Declaration Templates (Annex C, D and E) have been audited and certified as correct.

## 2. Definitions

- 2.1. **“bid”** includes written price quotations, advertised competitive bids or proposals;
- 2.2. **“bid price”** price offered by the bidder, excluding value added tax (VAT);
- 2.3. **“contract”** means the agreement that results from the acceptance of a bid by an organ of state;
- 2.4. **“designated sector”** means a sector, sub-sector or industry that has been designated by the Department of Trade and Industry in line with national development and industrial policies for local production, where only locally produced services, works or goods or locally manufactured goods meet the stipulated minimum threshold for local production and content;
- 2.5. **“duly sign”** means a Declaration Certificate for Local Content that has been signed by the Chief Financial Officer or other legally responsible person nominated in writing by the Chief Executive, or senior member / person with management responsibility(close corporation, partnership or individual).
- 2.6. **“imported content”** means that portion of the bid price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the Contractor or its subcontractors) and which costs are inclusive of the costs abroad (this includes labour or intellectual property costs), plus freight and other direct importation costs, such as landing costs, dock duties, import duty, sales duty or other similar tax or duty at the South African port of entry;
- 2.7. **“local content”** means that portion of the bid price which is not included in the imported content, provided that local manufacture does take place;
- 2.8. **“stipulated minimum threshold”** means that portion of local production and content as determined by the Department of Trade and Industry; and
- 2.9. **“sub-contract”** means the primary contractor’s assigning, leasing, making out work to, or employing another person to support such primary contractor in the execution of part of a project in terms of the contract.
3. **The stipulated minimum threshold(s) for local production and content (refer to Annex A of SATS 1286:2011) for this bid is/are as follows:**

Industry/sector/sub-sector	Minimum threshold for local content
Steel products and components for construction	100%
Electrical and telecom cables	90%

4. Does any portion of the services, works or goods offered have any imported content?  
(Tick applicable box)

YES		NO	
-----	--	----	--

- 4.1 If yes, the rate(s) of exchange to be used in this bid to calculate the local content as prescribed in paragraph 1.5 of the general conditions must be the rate(s) published by SARB for the specific currency at 12:00 on the date of advertisement of the bid.

The relevant rates of exchange information is accessible on [www.resbank.co.za](http://www.resbank.co.za).

Indicate the rate(s) of exchange against the appropriate currency in the table below (refer to Annex A of SATS 1286:2011):

Currency	Rates of exchange
US Dollar	
Pound Sterling	
Euro	
Yen	
Other	

T2.1.

NB: Bidders must submit proof of the SARB rate(s) of exchange used.

5. Were the Local Content Declaration Templates (Annex C, D and E) audited and certified as correct?  
(Tick applicable box)

YES		NO	
-----	--	----	--

5.1. If yes, provide the following particulars:

- (a) Full name of auditor: .....  
(b) Practice number: .....  
(c) Telephone and cell number: .....  
(d) Email address: .....

(Documentary proof regarding the declaration will, when required, be submitted to the satisfaction of the Accounting Officer / Accounting Authority)

6. Where, after the award of a bid, challenges are experienced in meeting the stipulated minimum threshold for local content the DTI must be informed accordingly in order for the DTI to verify and in consultation with the AO/AA provide directives in this regard.

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T2.1.

**LOCAL CONTENT DECLARATION  
(REFER TO ANNEX B OF SATS 1286:2011)**

**LOCAL CONTENT DECLARATION BY CHIEF FINANCIAL OFFICER OR OTHER LEGALLY RESPONSIBLE PERSON NOMINATED IN WRITING BY THE CHIEF EXECUTIVE OR SENIOR MEMBER/PERSON WITH MANAGEMENT RESPONSIBILITY (CLOSE CORPORATION, PARTNERSHIP OR INDIVIDUAL)**

**IN RESPECT OF BID NO. ....**

**ISSUED BY:** (Procurement Authority / Name of Institution):  
.....

NB

1 The obligation to complete, duly sign and submit this declaration cannot be transferred to an external authorized representative, auditor or any other third party acting on behalf of the bidder.

2 Guidance on the Calculation of Local Content together with Local Content Declaration Templates (Annex C, D and E) is accessible on <http://www.thedtic.gov.za/sectors-and-services/2/industrial-development/industrial-procurement/>. Bidders should first complete Declaration D. After completing Declaration D, bidders should complete Declaration E and then consolidate the information on Declaration C. **Declaration C should be submitted with the bid documentation at the closing date and time of the bid in order to substantiate the declaration made in paragraph (c) below.** Declarations D and E should be kept by the bidders for verification purposes for a period of at least 5 years. The successful bidder is required to continuously update Declarations C, D and E with the actual values for the duration of the contract.

I, the undersigned, ..... (full names),  
do hereby declare, in my capacity as .....  
of ..... (name of bidder entity), the  
following:

- (a) The facts contained herein are within my own personal knowledge.
- (b) I have satisfied myself that:
- (i) the goods/services/works to be delivered in terms of the above-specified bid comply with the minimum local content requirements as specified in the bid, and as measured in terms of SATS 1286:2011; and
  - (ii) the declaration templates have been audited and certified to be correct.
- (c) The local content percentage (%) indicated below has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E which has been consolidated in Declaration C:

**Steel products and components for construction**

Bid price, excluding VAT (y)	R
Imported content (x), as calculated in terms of SATS 1286:2011	R
Stipulated minimum threshold for local content (paragraph 3 above)	
Local content %, as calculated in terms of SATS 1286:2011	

**Electrical and telecom cables**

Bid price, excluding VAT (y)	R
Imported content (x), as calculated in terms of SATS 1286:2011	R
Stipulated minimum threshold for local content (paragraph 3 above)	
Local content %, as calculated in terms of SATS 1286:2011	

**If the bid is for more than one product, the local content percentages for each product contained in Declaration C shall be used instead of the table above.**

T2.1.

The local content percentages for each product has been calculated using the formula given in clause 3 of SATS 1286:2011, the rates of exchange indicated in paragraph 4.1 above and the information contained in Declaration D and E.

(d) I accept that the Procurement Authority / Institution has the right to request that the local content be verified in terms of the requirements of SATS 1286:2011.

(e) I understand that the awarding of the bid is dependent on the accuracy of the information furnished in this application. I also understand that the submission of incorrect data, or data that are not verifiable as described in SATS 1286:2011, may result in the Procurement Authority / Institution imposing any or all of the remedies as provided for in Regulation 13 of the Preferential Procurement Regulations, 2017 promulgated under the Preferential Policy Framework Act (PPPFA), 2000 (Act No. 5 of 2000).

**SIGNATURE:** \_\_\_\_\_

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

**WITNESS No. 1** \_\_\_\_\_

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

**WITNESS No. 2** \_\_\_\_\_

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

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## T2.2.8 DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS (Continued.....)

BSC 527 Item 8.6

T2.1.

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**T2.2.8 DECLARATION CERTIFICATE FOR LOCAL PRODUCTION AND CONTENT FOR DESIGNATED SECTORS  
(Continued.....)**

**IN TERMS OF THE GUIDELINE DOCUMENT FOR CALCULATING LOCAL CONTENT, ANNEXURE C (ATTACHED)  
MUST BE SUBMITTED WITH THE TENDER.**

**PLEASE INSERT IT HERE.**

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T2.1.

## T2.2.9 EXPERIENCE OF KEY PERSONNEL

Provide relevant information as prescribed below for the following Key Persons proposed in the tender to fulfil the following positions:

### Key Person Positions

- A. Mechanical Engineer
- B. Project Manager
- C. Site Agent/Foreman

The experience of each key person, relevant to the scope of work, will be evaluated from the points below:

- 1) General experience (total duration of activity), level of education and training and positions held by the key person.
- 2) The education, training and experience of the person, in the specific sector, field, subject, etc. which is directly linked to the scope of work.

The bidder **must** fill in the CV template that is provided on the page below:

**N.B: Should tenderers submit comprehensive CV documents (i.e not following the CV format below), a score of zero points will be awarded to the bidder.**

The scoring of the experience of key staff will be as follows:

CV FORMAT	
Name and Surname of Employee:	
Identity Number	
Place of Birth	
Name of Current Employer	
No. of years worked at Current Employer.	
Position in Current Company	
Place of tertiary study (post school education) and dates attended:	
Level of education (list qualifications where necessary)	

T2.1.

Years of relevant experience in construction management and/or semi-panel trailer manufacturing (relevance to hydraulic lifting floors and/or hydraulically operated multi-level trailers for the transport of vehicles) (design, construction and fabrication of semi-panel trailers).	
Number of projects worked on that is relevant to semi-panel trailer manufacturing (relevance to hydraulic lifting floors and/or hydraulically operated multi-level trailers for the transport of vehicles) (provide evidence on projects worked, dates worked, duties etc)	

T2.1.

Description	Minimum Score	Maximum Score
<p><i>CV of key personnel that are relevant to construction engineering projects and/or semi-panel trailer manufacturing (relevance to hydraulic lifting floors and/or hydraulically operated multi-level trailers for the transport of vehicles) (refer to CV format above):</i></p> <p><i>If comprehensive CVs are submitted by the bidder (i.e: not adhering to the CV format presented above) – 0 points will be awarded.</i></p> <p><b>Project Manager</b></p> <p><b>Qualifications:</b></p> <p><i>A relevant diploma or degree in the built environment (Mechanical, electrical engineering or Project management qualification) etc. Professional registration with the Engineering Council of South Africa.</i></p> <ul style="list-style-type: none"> <li>Diploma in Engineering or Project Management with no Professional Registration - <b>1 point</b></li> <li>Diploma in Engineering or Project Management with Professional Registration (PR Technician/ PMP/ PrCM/ PrCPM) - <b>2 points</b></li> <li>Bachelor's degree/Bachelors of Technology in Engineering or Project Management with no professional registration - <b>3 points</b></li> <li>Bachelor of Technology in Engineering or Project Management with a professional registration (PrTech/ PMP/ PrCM/ PrCPM) - <b>4 points</b></li> <li>Bachelor's degree in Engineering or Project Management with a professional registration (PrEng/ PMP/ PrCM/ PrCPM) - <b>5 points</b></li> </ul>	5	3
<p><b>Years of Relevant Experience:</b></p> <p><b>Experience of Mechanical Engineer/Mechanical Technologist in construction engineering and/or design, construction monitoring of semi-panel trailer manufacturing (relevance to hydraulic lifting floors and/or hydraulically operated multi-level trailers for the transport of vehicles).</b></p> <ul style="list-style-type: none"> <li>1 project – 1 point</li> <li>2 projects - 2 points</li> <li>3 projects - 3 points</li> <li>4 projects – 4 points</li> <li>&gt; 4 projects – 5 points</li> </ul>	5	4
<p><b>Years of Relevant Experience:</b></p> <p><b>Experience of Project Manager in the management of construction engineering projects and/or semi-panel trailer manufacturing (relevance to hydraulic lifting trailer floors, sides and/or hydraulically operated multi-level trailers for the transport of vehicles).</b></p> <ul style="list-style-type: none"> <li>1 project – 1 point</li> </ul>	5	3

T2.1.

<ul style="list-style-type: none"> <li>• 2 projects - 2 points</li> <li>• 3 projects - 3 points</li> <li>• 4 projects - 4 points</li> <li>• &gt; 4 projects - 5 points</li> </ul>		
<p><b>Years of Relevant Experience:</b></p> <p>Experience of the Site Agent/Foreman in the management construction engineering projects and/or semi-panel trailer manufacturing (relevance to hydraulic lifting trailer floors, sides and/or hydraulically operated multi-level trailers for the transport of vehicles).</p> <ul style="list-style-type: none"> <li>• 1 project - 1 point</li> <li>• 2 projects - 2 points</li> <li>• 3 projects - 3 points</li> <li>• 4 projects - 4 points</li> <li>• &gt; 4 projects - 5 points</li> </ul>	5	4
<b>Maximum Score</b>	$\frac{20}{2} = 10$	
<b>Minimum Acceptance Score</b>	$\frac{14}{2} = 7$	
<b>BIDDERS SCORE</b>		



T2.1.

## T2.2.10 PROPOSED ORGANIZATION AND STAFFING (Not Applicable)

The Tenderer should propose the structure and composition of their team i.e. the main disciplines involved, the key staff member / expert responsible for each discipline, and the proposed technical and support staff and site staff. The roles and responsibilities of each key staff member / expert should be set out as job descriptions. In the case of an association / joint venture / consortium, it should, indicate how the duties and responsibilities are to be shared.

The Tenderer must attach his / her organization and staffing proposals to this page.

The scoring of the proposed organization and staffing will be as follows: [ ]

<b>No submission (score 0)</b>	No Organizational and Staffing proposal submitted.
<b>Poor (score 40)</b>	The organization chart is sketchy; the staffing plan is weak in important areas. There is no clarity in allocation of tasks and responsibilities.
<b>Satisfactory (score 70)</b>	The organizational chart is complete and detailed, the technical level and composition of the staffing arrangements are adequate.
<b>Good (score 90)</b>	Besides meeting the “satisfactory” rating, staff are well balanced i.e. they show good co-ordination, complimentary skills, clear and defined duties and responsibilities. Some members of the project team have worked together before on limited occasions.
<b>Very good (score 100)</b>	Besides meeting the “good” rating, the proposed team is well integrated and several members have worked together extensively in the past.

T2.1.

**T2.2.11 TENDERER'S SCHEDULE OF PLANT AND EQUIPMENT – Not Applicable**

The following are lists of major items of relevant equipment that I / we presently own or lease and will have available for this contract if my / our Tender is accepted.

**(a) Details of major equipment that is owned by me / us and immediately available for this contract.**

DESCRIPTION (type, size, capacity etc.)	QUANTITY	YEAR OF MANUFACTURE

*Attach additional pages if more space is required*

**(b) Details of major equipment that will be hired, or acquired for this contract if my / our Tender is accepted**

DESCRIPTION (type, size, capacity etc.)	QUANTITY	HOW ACQUIRED	
		HIRE/ BUY	SOURCE

*Attach additional pages if more space is required*

The Tenderer undertakes to bring onto site without additional cost to the Employer any additional plant not listed but which may be necessary to complete the contract within the specified contract period.

***Failure to complete this form properly and correctly, will lead to the conclusion that the Tenderer does not have the necessary plant and equipment resources at its disposal, which will prejudice its Tender.***

SIGNATURE: ..... DATE: .....  
(of person authorized to sign on behalf of the Tenderer)

T2.1.

**T2.2.12 QUALITY ASSURANCE AND ENVIRONMENTAL MANAGEMENT | 10**

1. Does the Tenderer have a quality management system which is certified in terms of ISO 9001: 2015

YES	NO
-----	----

2. If "yes", Tenderer to supply brief summary of structure of system:

.....

.....

.....

.....

.....

.....

.....

3. If "no", does the Tenderer intend to apply for certification? .....

YES	NO
Date	

By when? .....

OR

4. If "no", does the Tenderer have its own system? .....

YES	NO
-----	----

5. If "yes", please supply details of the system .....

.....

.....

.....

.....

6. Does the Tenderer have an environmental management system which is certified in terms of ISO 14001 .....

YES	NO
-----	----

7. If "yes", Tenderer to supply brief summary of structure of system:

.....

.....

.....

.....

.....

8. If "no", does the Tenderer intend to apply for certification? .....

YES	NO
Date	

By when? .....

OR

9. If "no", does the Tenderer have its own system? .....

YES	NO
-----	----

T2.1.

10. If “yes”, please supply details of the system .....
- .....
- .....
- .....
- .....

If the Tenderer does not intend to apply for certification it shall submit details of the quality / environmental management system presently in place. ]

**The Tenderer shall insert here a copy of the company’s quality assurance plan, control procedures and the relevant documentation supporting its commitment to environmental management. The successful Tenderer shall furnish the Employer a detailed Quality Control Plan (QCP) and Procedure for all materials, such as valves, pumps, motors, pipes, specials and fittings for approval prior to any fabrication, coating, lining and delivery. In the event of these documents being too extensive to be included in the procurement document, an abbreviated version of the master document will be included, referring to the master document.**

Scoring of Quality Assurance and Environmental Management will be as follows: [ ]

The bidder must propose the quality assurance method, including who will do the quality assurance for the products of the project (in terms of the modified semi-panel trailer expansion, paintwork, lightning protection, fabrication, electrical and other mechanical related work). The bidder must show their approach in managing the quality of all deliverable items of the project. Some quality management considerations are listed below:

- Process control criteria for monitoring and measurement of each deliverable item so that the planned results are achieved.
- Planning – to ensure that the organization considers the risks and opportunities for improvement on the design of the semi-panel trailer.
- Support – to ensure the organization provides the resources necessary for the establishment, implementation, maintenance and continual improvement of the quality management system for effective operation.
- Operation – to ensure the organization plans, implements and controls the processes that are necessary for its production and service provision including any external provided services such as paintwork, supply of aircon and diesel generator and the supply and installation of the educational exhibits.
  - Design and development planning that must include control for determining if design and development requirements have been met and the process has been carried out appropriately at review, verification and validation stages such as project plans, minutes of meetings, completion of action items, test reports, drawings and work instructions.
  - Design and development changes to determine, review and control changes made during or subsequent to the design and development process
  - Documented information (maintenance procedures) to ensure all information/reporting are kept up to date.
  - Production and service provision – the organization must establish controls for providing products and delivering services that ensure the intended results are achieved.
  - Performance Evaluation –to ensure that the organization conducts monitoring, measurement, analysis and evaluation to determine if the intended results are being achieved.

T2.1.

- Improvement – to ensure that the organization determines opportunities for improvement, as well as plans to achieve the intended results to enhance customer satisfaction.
- Highlight the relevant risks associated with this type of project.

QUALITY ASSURANCE AND ENVIRONMENTAL MANAGEMENT		Bidders Score
No submission (score 0)	No Quality Management System (QMS) submitted	
2	<b>Poor</b> - QMS is incomplete, Bidder fails to meet <b>any</b> of the minimum requirements	
4	<b>Unacceptable</b> – Bidder fails to provide adequate evidence that all minimum requirements can be satisfied, minimal QMS criteria listed above are covered.	
6	<b>Less than Satisfactory</b> – Bidder is able to meet <b>all</b> of the minimum requirements but does not provide additional justification in their solution to achieve the project objectives.	
7	<b>Good/ Satisfactory</b> – The bidder meets <b>all</b> the QMS requirements as highlighted above with a firm evidence base and is well <b>justified</b> in their solution to achieve the project objectives. The approach is specifically tailored to address the specific project objectives and methodology and is sufficiently flexible to accommodate changes that may occur during execution. The Tenderer has environmental management system which is certified in terms of ISO 14 000/ISO 9001.	
10	<b>Excellent/Outstanding</b> – The bidders response exceeds the QMS requirements that were highlighted. The bidder has shown the ability to add engineering value to the required project activities and is innovative in presenting their solution to their QMS submission. The approach paper details ways to improve the project outcomes and the quality of the outputs.	
<b>Maximum Score</b>		<b>10 points</b>
<b>Minimum Acceptance Score</b>		<b>7 points</b>

## T2.2.13 METHOD STATEMENT [ 15 ]

The method statement must respond to the scope of work and outline the methodology in achieving the project objectives. The method statement should also articulate what value the tenderer will add in achieving the stated objectives for the project.

The tenderer must as such explain his / her understanding of the objectives of the project and the Employer's stated and implied requirements, highlight the issues of importance, and explain their technical approach that they would adopt to address them. The method statement should also include a quality management plan which outlines processes, procedures and associated resources, applied by whom and when, to meet the project user requirements and to indicate how these risks will be managed and what contribution can be made regarding value management. As a guideline, the method statement must also respond to the following:

- a) How will the semi-panel trailer be procured, designed, constructed and modified as per the project scope that is highlighted in volume 2.
- b) Site establishment description for the work required on the semi-panel trailer.
- c) External and internal work required on the semi-panel trailer in terms of modification, fabrication, electrical, mechanical, equipment supply and other related work.
- d) Quality management control on all work conducted on the semi-panel trailer.
- e) How will the project risks be managed and controlled?
- f) Project health and safety requirements surrounding the work conducted on the semi-panel trailer.
- g) How will the scientific educational exhibits be procured and installed?
- h) How will the bidder ensure the safe delivery of the semi-panel trailer to the sub-contractor whom will proceed with the scientific educational exhibit installation? in addition, how will the bidder ensure that there is adequate transfer of skill to the sub-contractor regarding the operation of the semi-panel trailer expansion?  
  
*N.B – there must be clear communication between the main contractor and sub-contractor during the educational exhibit installation – (is the space sufficient on either side of the semi-panel trailer for the scientific educational exhibit installation?)*
- i) How will the bidder ensure that the modified semi-panel trailer conforms to the South African road regulations (NATIS)?

**The Tenderer must attach his / her method statement to this page. The method statement should not be longer than 10 pages (Arial font, 1.5 line spacing, font size 10).**

The scoring of the approach paper will be as follows: [ 15 ]

**The criteria highlighted above from a) to i) each represents a scoring range of 0-5 points.**

The table below shows the scoring criteria for the method statement submission.

T2.1.

Method Statement Scoring Distribution Description for the criteria listed from a) to i)	
0	No Method statement submitted
1	Poor - response is incomplete, non-compliant. Bidder fails to meet most of the minimum requirements based on the stipulated criteria highlighted above.
2	Less than satisfactory – Bidder fails to provide adequate evidence that all minimum requirements can be satisfied. The solution presented is not relevant to the stipulated criteria presented.
3	Good/ Satisfactory – The bidder meets all the main points of the method statement but it is not logically organised. The bidder has revealed basic engineering knowledge and their skills in reference to the stipulated criteria statements. Their approach however does not deal with the critical characteristics of the project. The quality plan, manner in which risk is to be managed is very generic
4	Very Good – The bidder meets all the method statement criteria and has structured his/her statement with a logical flow. Each answer to the stipulated criteria was specific, succinct and effectively conveyed. The bidder has also made reference to engineering literature in compiling their method statement.
5	Excellent/Outstanding – The bidder's response exceeds the method statement stipulated criteria. The bidder has shown the ability to add engineering value and is innovative in presenting their solution to the method statement. In addition, the bidder has demonstrated an <b>in depth</b> knowledge on their understanding of the method statement.

Method Statement		BIDDERS SCORE
Criteria	No Method statement submitted	
a	How will the semi-panel trailer be procured, designed, constructed and modified as per the project scope that is highlighted in volume 2.	
b	Site establishment description for the work required on the semi-panel trailer.	
c	External and internal work required on the semi-panel trailer in terms of modification, fabrication, electrical, mechanical, equipment supply and other related work.	
d	Quality management control on all work conducted on the semi-panel trailer.	
e	How will the project risks be managed and controlled?	
f	Project health and safety requirements surrounding the work conducted on the semi-panel trailer.	
g	How will the scientific educational exhibits be procured and installed?	
h	How will the bidder ensure the safe delivery of the semi-panel trailer to the sub-contractor whom will proceed with the scientific educational exhibit installation? in addition, how will the bidder ensure that there is adequate transfer of skill to	

T2.1.

	the sub-contractor regarding the operation of the semi-panel trailer expansion?	
i	How will the bidder ensure that the modified semi-panel trailer conforms to the South African road regulations (NATIS)?	
<b>Maximum Score</b>		$\frac{45}{3} = 15$
<b>Minimum Acceptance Score</b>		$\frac{33}{3} = 11$
<b>Bidders Score</b>		

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#### T2.2.14 PRELIMINARY PROGRAMME (10)

The Tenderer shall attach a preliminary programme reflecting the proposed sequence and the execution of the main project components. The programme shall be in accordance with the information supplied in the Contract, requirements of the Project Specifications and with all other aspects of his Tender.

Each bidder must provide a schedule for completion of all the work activities and delivery of items specified in the scope of work. Performance or delivery schedules shall be indicated for phases or segments, as applicable, as well as for the overall program. Schedules shall be shown in terms of **calendar months**. In this event, proposals based upon the bidder's best alternative schedule, involving no overtime will be accepted for consideration.

The project plan must consist of the following:

- Risk Management Mitigation Plan. The bidder must identify the relevant potential risks in the construction and manufacture of the semi-panel trailer, transportation of the completed unit to their sub-contractors premises during the educational exhibit installation and determine the impact against the project objectives. In addition, the bidder must propose a mitigation plan in reducing the identified risks posed to this project.
- Work Breakdown Structure. The bidder must identify all the project tasks that will produce each deliverable against the scope of work and the entire project team that will be capable in the manufacturing of the semi-panel trailer, fabrication work, electrical and lighting, paintwork, welding and final commissioning to test the operability of the slide out expansion.

The project plan must indicate commissioning activities and potential timeline in achieving the final completion. As a guide, the list below shows **some** of the project activities that should be catered for (the bidder is not confined to the project activities listed below).

- Detailed design documentation of the semi-panel trailer and client update meetings
- Review of detail design documentation by Umgeni Water.
- Approval of detailed design report by Umgeni Water.
- Construction, modification and fabrication of the semi-panel trailer.
- Supply and installation of the diesel generator, aircon unit and ablution facility.
- Commissioning of **all** electrical components inside the semi-panel trailer.
- Monthly visits by the client for inspections.
- Commissioning of the semi-panel trailer that will test the full functionality of all expandable sections.
- Transportation of the semi-panel trailer to their sub-contractors premises for the complete installation of all the educational exhibits.
- Installation of all the educational exhibits inside the semi-panel trailer.
- Commissioning of all the educational exhibits installations to ensure correct functionality.
- Correct positioning of the completed semi-panel trailer unit onto the selected truck (UW will purchase the truck at a later stage).
- Final commissioning of the completed semi-panel trailer unit with all the accessory items as highlighted in the scope of work.
- Handover of completed vehicle to Umgeni Water.

T2.1.

The bidder can use Microsoft excel or Microsoft projects to compile their forecasted project plan. The plan must specifically indicate their work activities as highlighted above.

PROGRAMME														
Component / sub component	WEEKS / MONTHS													

**Note:** The programme must be based on the completion time as specified in the Contract Data. No other completion time that may be indicated on this programme will be regarded as an alternative offer, unless it is listed in supported by a detailed statement to that effect, all as specified in the Tender Data.

Scoring of the preliminary programme will be as follows:

**Note:** The programme must be based on the completion time as specified in the Contract Data. No other completion time that may be indicated on this programme will be regarded as an alternative offer, unless it is listed in supported by a detailed statement to that effect, all as specified in the Tender Data.

T2.1.

Scoring of the preliminary programme will be as follows:

Project Plan Submission		Bidders Score
No submission (score 0)	No project plan submitted	
1	<b>Poor</b> - response is incomplete, non-compliant. Bidder fails to meet any of the minimum requirements	
3	<b>Less than Satisfactory</b> – Bidder fails to provide adequate evidence that all minimum requirements can be satisfied.	
7	<b>Good/ Satisfactory</b> – The bidder meets all the milestone requirements with a firm evidence base and is well justified in their solution to achieve the project objectives. The bidder has highlighted the project risks and provided a risk mitigation plan that can minimise further delays. In addition, the programme considered realistic and adequately shows the main components and compliance with completion date	
10	<b>Excellent/Outstanding</b> – The bidder's response exceeds the project scope of work in terms of the milestones listed above. The bidder has shown the ability to add engineering value and is innovative in presenting their solution to the project plan submission	
<b>Maximum Score</b>		<b>10 points</b>
<b>Minimum Acceptance Score</b>		<b>7 points</b>

Suitability of programme	
No submission (score 0)	No preliminary programme submitted
<b>Poor (score 40)</b>	Programme is inadequate and/or considered unrealistic and does not achieve required completion date
<b>Satisfactory (score 70)</b>	Programme is considered realistic and adequately shows the main components and compliance with completion date
<b>Good (score 90)</b>	Programme is considered realistic and includes the main components and sub subcomponents and compliance with completion date
<b>Very good (score 100)</b>	Programme is considered realistic and includes the main components and subcomponents and linkages and compliance with completion date

### T2.2.14a CONCEPTUAL DESIGN REPORT SUBMISSION (25)

The conceptual design report forms part of the technical proposal submission. All prospective bidders will be evaluated and the **shortlisted** bidders who achieve the minimum criteria of ( $\geq 57$  points) will proceed to phase two of the functionality evaluation. The tenderer must demonstrate their understanding of the project objectives and the employers stated implied requirements, highlight the issues of importance and explain the technical approach they would adopt to address them. In addition, the shortlisted bidder must provide a conceptual 3D model of the semi-panel trailer design.

The bidder must make reference to volume 2, Annexure C5.1 for additional project specifications and conceptual drawings/images for the semi-panel that shows the single side trailer expansion, side entrances, layout for the educational exhibits, diesel generator and ablution facility.

Each bidder must compile a conceptual design report and a separate presentation to Umgeni Water. During the presentation, the bidder must ensure that all diagrams or 3D models that are presented, are of high quality and must be clearly visible for the client to observe. The total duration of the presentation must be 20 minutes with an additional 10 minutes required for questions posed by the evaluation team.

The entire model of the semi-panel trailer including the installed equipment (aircon unit, diesel generator, ablution facility, educational exhibits) must be sized and scaled to give a true representation of the actual model and its internal and external surroundings (to show primary school learners and educators). The entire model must be automated with 3D rendering images that will show the full functioning of the semi-panel trailer in terms of its expansion and retraction ability while the vehicle is stationary. This must also include the educational activities that take place under the retractable awning. The dimensions of the educational exhibits and conceptual 3D drawings of the semi-panel trailer can be viewed in Volume 2, Annexure C5.1 as a guideline.

The final report (inclusive of the 3D conceptual model of the semi-panel trailer) must be submitted electronically to Umgeni Water.

#### Report Format:

The following headings must be used in compiling the conceptual design report of the semi-panel trailer:

- **Table of Contents**
- **Purpose**
- **Scope of Work**
  - Design objectives
  - Design basis (Reference to Engineering practices where applicable).
- **Method statement in achieving the design objectives.**
- **3D design model concept** of the semi-panel trailer utilising relevant engineering software (Autocad etc). The proposed semi-panel trailer design layout showing the retractable awning extension (side and top views). The entire 3D model must include the installed equipment that must be sized and scaled to give a true representation of the actual model. The bidder must make reference to volume 2, annexure C5.1 for concept images of the semi-panel trailer design.
- Summary table that lists all the proposed equipment with its dimensions and maximum weight requirements.
- **References Section**

T2.1.

- **Annexures section** (List any additional drawings, tables summaries etc).

**Conceptual Design Considerations/Factors:** Some design factors (not limited to) are listed below.

- Semi-panel trailer handling whilst the vehicle is in motion.
- How will all the installed equipment inside the semi-panel trailer be securely positioned whilst the vehicle is in motion?
- How will the semi-panel trailer side expansion be stable once the truck is stationary? (stabilisers for the semi-panel trailer and outriggers for the expanded section of the semi-panel trailer or other?) Justify
- Estimate the sizing of the diesel generator unit based on the electrical requirements within the semi-panel trailer as well as the electrical power to allow for the retraction and expansion of the trailer side. As a guide, it is expected to operate the diesel generator for a maximum of 5 hours per day for 15 days in a month
- Dynamic loading/weight distribution of items inside the trailer. How will the loading affect the axles and suspension system whilst the entire vehicle is stationary (will design loads be exceeded?). How do you ensure that there will be equal weight distribution whilst the vehicle is in motion?
- Centre of gravity – to avoid tipping over curves or turns if there is a high centre of gravity on the designed load of the semi-panel trailer.
- During slide out extension and under adverse weather conditions such as strong winds, heavy rainfall. How will water leaks be prevented and how will the structural integrity of the semi-panel trailer be maintained during a harsh weather event?
- Type of driving mechanism that will allow for the movement of the floor and trailer side expansion? (power to take off unit? electrically actuated valves? hydraulic cylinders?).
- Description of the functionality for the floor and single side semi-panel trailer expansion and retraction whilst the vehicle is stationary.
- Ablution facility installation – Will there be a concealed false wall to position the freshwater tank, wastewater tank and pump based on the given dimensions (Volume 2). Can the wastewater tank be easily accessible for waste removal?
- Material of construction selection for the walls and floors (is it durable, simple to clean?). What will be the material of construction for the safety rails and steps at the specified entrance locations to the semi –panel trailer? The material selected must be corrosion and stone chip resistant.
- Does the semi-panel trailer floor have non-slip material? How will the cleaning of the non-slip material be simple and effective?
- What will be the maintenance frequency and maintenance activities required for the expanded section of the semi-panel trailer?
- Does the diesel generator need to be removed for its maintenance service or can it be conducted inside the trailer? (Will there be adequate working space for the maintenance technician conducting its annual service?)
  - How does the transfer of oil/diesel take place? Will a separate pump be needed?
  - Bund wall requirements to contain any oil spillage within the room.
  - Will there be a horizontal exhaust vent or vertical exhaust outlet from the diesel generator? Which is the preferred option and why?

Does the diesel generator need to be removed for its maintenance service or can it be conducted inside the trailer? (Will there be adequate working space for the maintenance technician conducting its annual service?)

T2.1.

- Control box location (external and internal) to control the hydraulic lifting of the floor and semi-panel trailer side expansion. A standby unit is also preferred. The bidder must advise on a feasible location for the second control box unit. Can the standby unit be installed on the inside of the truck?
- Safety requirements specific to this project:
  - Possible oil based fire event
  - Possible electrical based fire event.
  - Safety rails and anti-slip mats on all stairs provided to each entrance location to the semi-panel trailer.
  - Fireproof room for where the diesel generator is installed.
  - How will the bidder ensure noise reduction from the diesel generator room to the main section of the semi-panel trailer where the scientific educational exhibits will be installed?

*The bidder is not confined to the above mentioned design considerations and is encouraged to highlight additional design factors that will assist in achieving the project objectives.*

**The activities for the 3D concept model of the semi-panel trailer are highlighted below in further detail:**

- Functionality of the semi panel trailer expansion. The 3D model must show the opening and closing of the panel trailer expansion. Are stabilisers and outriggers required?
- One rear entrance with a wheel chair lift system to cater for physically challenged learners. The bidder can suggest where would be appropriate location for the wheel chair lift system? Will the wheel chair lift system be fixed or can it be removed and stored in the storage compartments under the semi-panel trailer?
- One side entrance on the semi-panel trailer expansion to allow for “flow” of learners into the panel trailer (Volume 2, Annexure C.5.1)
- A retractable awning on one side of the panel trailer. Learners will engage in other educational activities under the awning. A suitable awning extension must be acceptable according to engineering standards.
- An emergency shut-off switch for the diesel generator at a suitable location on the outside of the semi-panel trailer.  
One switch installed on the inside of the diesel generator room.  
One switch installed in the main section of the semi-panel trailer.  
One switch installed on the outside of the semi-panel trailer.
- Appropriately sized windows and an extractor fan in the ablution facility room.
- Appropriately sized louvre side panels in the diesel generator room.
- A ladder construction to the top of the semi-panel trailer to access the aircon condenser unit for future maintenance or asset replacement activities.
- Control box/panel for the functioning of the expansion/retraction of the slide out. Consider installing a second unit inside the truck as a standby unit.
- The storage compartments positioned underneath the semi-panel trailer to store all the external educational physical models, tables (Volume 2, Annexure C5.1). This is to ensure that the prevention of theft and vandalism takes place.
- The demarcated area for each educational exhibit on each side of the semi- panel trailer as per (Volume 2, Annexure C5.1).
- Positioning of the diesel generator in the designated room with an exhaust vent. This room must include a control panel to operate the diesel generator with an emergency shutoff switch.

T2.1.

- An additional electrical control panel (with manual changeover switch for the operation of the diesel generator) and one electrical distribution box situated in the main part of the trailer (ie: walkthrough section of the trailer). The main control panel must also consist of an emergency shutoff switch for the diesel generator).
- Positioning of the bulk head/ceiling cassette air con unit in the main part of the trailer (where the educational exhibits will be installed).
- Positioning of the ablution facility and its components in one section of the semi-panel trailer as per the concept drawing.
- Positioning of water and wastewater tank in the ablution facility. A pump will be required to transfer water to the hand-wash basin and toilet unit.
- Paintwork, shop-fitting and effective lighting throughout the semi-panel trailer.
- Double plug point installation for each installed educational exhibit.
- Appropriate number of light switches inside the semi panel trailer inclusive of each room as per the conceptual images in Volume 2, Annexure C5.1.
- Maintenance frequencies and activities for each installed equipment such as the diesel generator, aircon unit, all moving parts associated with the semi-trailer side and floor expansion and the actual semi-panel trailer unit. This can be summarized in the report.
- Recommendations for improvement of the operability the semi-panel trailer design.
- Safety concerns as highlighted in the method statement above. Ensure that there is a fireproof wall between the diesel generator room and the educational room where the learners will be housed (*this is a detailed design requirement, noting purposes*).
- Accessibility to the aircon unit for future maintenance activities by showing a ladder installation to the top of the semi-panel trailer so access the condenser unit.
- How will the cabling/electrical work be installed (Will there be a falsewall to conceal cabling?)
- How will the reticulation of water take place for the ablution facility to function? Similar consideration must be made for where the discharge pipe for the aircon will be installed

The writing requirements for the conceptual design report are as follows:

- line spacing 1.5
- Font: Arial, size 10
- 2cm margins

T2.1.

The following table below describes the evaluation criteria for the conceptual design report submission.

Conceptual Design Report Submission		Bidders Score
No submission (score 0)	No report submitted	
5	<b>Poor</b> - response is incomplete, non-compliant against the report format. Bidder fails to meet any of the minimum requirements	
10	<b>Less than Satisfactory</b> – Bidder fails to provide adequate evidence that all minimum requirements can be satisfied. Report is incomplete according to the stipulated report format.	
18	<b>Good/Satisfactory</b> – The conceptual design report meets all the expectations as stipulated above even though the bidder has not shown any innovation in their conceptual design. The bidder has displayed an acceptable understanding of the design consideration factors and project objectives.	
25	<b>Excellent/Outstanding</b> – The conceptual design report meets all expectations as stipulated above. The bidder has shown innovation by presenting creativity and a sound engineering solution for the design of the semi-panel trailer. The bidder has also provided additional information in his/her understanding of the project objectives in terms of adding engineering value.	
<b>Maximum Score</b>		<b>25 points</b>
<b>Minimum Acceptance Score</b>		<b>18 points</b>



T2.1.

**Phase 1: Summary Scoring Sheet**

Evaluation Criteria	Maximum Score	Minimum Acceptance Score	Bidders Score
<b>A: Functionality Evaluation</b>			
Tenderers Experience	10	7	
Experience of Key Personnel	10	7	
Quality Assurance and Environmental Management	10	7	
Method Statement	15	11	
Preliminary Programme	10	7	
<b>B: Technical Proposal Evaluation</b>			
Conceptual Design Report	25	18	
<b>Total</b>	<b>80</b>	<b>57</b>	
<b>Proceed to Phase 2</b>	<b>Yes/No</b>	<i>Is minimum acceptance score ≥ 57 points</i>	

## PHASE 2: PRESENTATION OF THE CONCEPTUAL 3D MODEL FOR THE SEMI-PANEL TRAILER

Each shortlisted bidder will have a maximum time of 30 minutes (20 minutes to conduct their presentation and 10 minutes for questions from the evaluation panel).

### Evaluation Criteria for the Presentation of the Conceptual 3D Model of the Semi-Panel Trailer

- Note to the evaluation team: Each bullet point represented below represents a scoring range of 0 to 2 points.

Presentation Item	Minimum to Maximum Score	Bidders Score
<b>Question 1: Present what you have proposed in your methodology that will add engineering value to the project objectives provided:</b>		
<i>Scoring Criteria</i>		
<ul style="list-style-type: none"> <li>What is the recommended driving mechanism for the single expanded and retracted section of the semi-panel trailer whilst the vehicle is stationary?</li> <li>What will power the opening and closing of the trailer (power to take off unit vs diesel generator vs electrically actuated valves or other recommended method?)</li> <li>Will the selected driving mechanism be reliable and can the internal components installed withstand the vibrational effects during travel?</li> <li>Where will the control box be positioned for the operation of the semi-panel trailer expansion? – one unit must be shown on the outside of the semi-panel trailer and the standby unit can be installed on the inside of the truck. The bidder must advise if this feasible or propose another location for the standby unit.</li> <li>Estimate the capacity of the diesel generator that is required for this application as per the scope of work. Take into consideration all the electrical requirements for the educational exhibits, plug points, light switches, public address system, aircon unit, run time operation (approx diesel generator use: 5 hours day for four days a week usage).</li> </ul>	0-10	
<ul style="list-style-type: none"> <li>What is the material of construction selection for the floors, internal and external section side walls of the semi-panel trailer?</li> <li>Why is this the preferred material of construction?</li> <li>Has bidder made reference to corrosion and stone chip resistance against the semi-panel trailer material?</li> </ul>	0-6	
<ul style="list-style-type: none"> <li>Secure equipment positioning whilst the vehicle is in motion. How will this be achieved to prevent damage/loss against the semi-panel trailer?</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Equal weight distribution of the installed equipment inside the semi-panel trailer. Has this been considered?</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>How will the slide out room be adjusted to properly fit the sidewalls and to co-operate with the slide out mechanisms?</li> <li>Will the single slide out expansion have the necessary structural support to maintain its stability while the vehicle is at rest? Justify.</li> </ul>	0-4	
<ul style="list-style-type: none"> <li>Bidder to list the maintenance frequency and maintenance activities specific to semi-panel trailer, all moving parts and installed equipment (diesel generator, aircon unit and semi-panel trailer components).</li> <li>Does the diesel generator need to be removed for this purpose from the semi-panel trailer or can the maintenance be conducted inside the room? Justify your solution</li> </ul>	0-4	

T2.1.

<ul style="list-style-type: none"> <li>Has the bidder shown any reference to engineering literature documentation or relevant SANS guidelines during the conceptual design of the semi-panel trailer in terms of semi-panel trailer handling, load distribution, paintwork etc?</li> </ul>	0-2	
<b>Total Score for Question 1</b>	<b>30</b>	

<b>Question 2: Show the internal and external automatic rendering images of the semi-panel trailer in a 3D format using an engineering rendering agent software.</b>	<b>Minimum to Maximum Score</b>	<b>Bidders Score</b>
<i>Scoring Criteria</i>		
<ul style="list-style-type: none"> <li>Positioning of the designed semi-panel trailer onto a 4 by 2 truck which can be assumed at this stage.</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Rear entrance section of the semi-panel trailer showing the chair lift system for allowing physically challenged learners onto the platform.</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Two entrance sections on either side of the designed panel trailer to the diesel generator room for accessibility (Volume 2, Annexure C5.1).</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>One side entrance on the expanded section of the semi-panel trailer (Volume 2, Annexure C5.1).</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Semi-panel trailer expansion with the support legs/stabilisers for the trailer and outriggers for the expanded section of the semi-panel trailer.</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Proposed retractable awning design on the expanded section of the semi-panel trailer.</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Storage compartments designed underneath the semi-panel trailer for the storage of the educational physical models and tables, PA system and a wheel chair lift system (if this can be done).</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Showcase the five scaled external models that will be placed on the table on the outside of the semi-panel trailer with learners and educators under the retractable awning.</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Showcase scaled images of primary school based learners and educators on the inside and outside of the semi-panel trailer</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>General layout design in the main section of the semi-panel trailer where the educational exhibits will be installed (on either side of the semi-panel trailer)</li> </ul>	0-2	
<b>Internal rendering images (perspective images) for the:</b>		
<ul style="list-style-type: none"> <li>Fixed services room showing the diesel generator installation. The images must showcase a bundwall, lightswitches, exhaust vents, windows, floor side skirtings etc.</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Fixed services room showing the ablution facility (inclusive of the hand-wash basin, toilet unit, wastewater tank, fresh water tank).</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Fixed services rooms showing the bulk head aircon unit which will be installed on the main section of the semi-panel trailer.</li> </ul>	0-2	
<ul style="list-style-type: none"> <li>Demarcate the working area for each of the internal educational exhibits using the stipulated dimensions in Volume 2, Annexure C5.1.</li> </ul>	0-2	
<b>Fly-through animation for the external and internal sections of the designed semi-panel trailer:</b>		

T2.1.

<i>The flythrough animations must show the unique ability to highlight many different aspects of the interior and exterior aspects of the architectural developments including floors, textures, surfaces, light fitting distribution, roofing materials, installed equipment, exterior and interior paintwork, learners/educators inside and outside the semi-panel trailer.</i>	0-5	
<b>Total Score for Question 2</b>	<b>33</b>	

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Question 3: What are the safety considerations for the modified semi-panel trailer?	Minimum to Maximum Score	Bidders Score
<i>Scoring Criteria</i>		
<ul style="list-style-type: none"> <li>What factors have been considered for an electrical fire event?</li> <li>How will this be prevented?</li> </ul>	0-4	
<ul style="list-style-type: none"> <li>What factors have been considered for an oil fire event?</li> <li>How will this be prevented?</li> </ul>	0-4	
<ul style="list-style-type: none"> <li>Installation of a bund wall around the diesel generator to contain any spillages inside the designated room. Has this been shown on the model?</li> <li>How will the spillage be removed should this event occur?</li> </ul>	0-4	
<ul style="list-style-type: none"> <li>Emergency shut-off switches for the diesel generator. (has this been factored in the design, is it visible on the 3D model?) – Yes/No</li> <li>One emergency shut-off switch installed inside the diesel generator room.</li> <li>One emergency shut-off switch installed in the main section of the semi-panel trailer.</li> <li>One emergency shut-off switch installed on the outside of the semi-panel trailer.</li> </ul>	0-8	
<ul style="list-style-type: none"> <li>Design of the staircase/steps for learners and educators to enter the semi-panel trailer (Type of steps, hand rails etc)</li> <li>What safety measures have been considered in terms of achieving non-slip floors?</li> <li>Is the wheel chair lift system or other appropriate system available on the concept model to allow the physically challenged learner/educator into the semi-panel trailer?</li> <li>Will this unit be fixed onto the semi-panel trailer or will it be installed in a storage compartment below the semi-panel trailer?</li> </ul>	0-8	
<b>Total Score for Question 3</b>	<b>28</b>	
<b>Question 4: Highlight and show any innovative or creative ideas for the conceptual design of the semi panel-trailer, specifically relevant to the scope of work and the project objectives.</b> <b>(Main section of the semi-panel trailer where the educational exhibits will be installed, exterior section of the semi-panel trailer, colour usage, aesthetic appeal in terms of design of the semi-panel trailer.</b>	0-9	
<b>Total Score for Question 4</b>	<b>9</b>	
<b>Total Score for Questions 1 to 4</b>	$\frac{100}{5} = 20$	
<b>Minimum Acceptance Score</b>	$\frac{75}{5} = 15$	

The scoring of Question 4 which is based on the innovative/creative ideas for the semi-panel trailer will be assessed as follows:

Innovation/Creative Approach by Shortlisted Bidder for Question 4		Bidders Score
No submission (score 0)	No innovation or creative effort was considered on the 3D model.	
1	<b>Poor</b> – the 3D model is incomplete in terms of all the requirements that was stipulated.	
4	<b>Less than Satisfactory</b> – Bidder fails to provide adequate evidence of innovation in their 3D conceptual layout. The images are blurred and not clearly visible.	
7	<b>Good/Satisfactory</b> – The bidder has shown adequate creative effort. The 3D model image has met the criteria highlighted in Question 4.	
9	<b>Excellent/Outstanding</b> The 3D design model is appealing in terms of the creative input that can be seen in the exterior and interior sections of the semi-panel trailer, and there is substantial detail in the model. All graphical presentations can be clearly viewed and the images are aesthetically appealing.	

At this stage, each shortlisted bidder will be scored and the highest ranked bidder will be awarded the contract based on their technical evaluation (phase 1 and 2) as well as the evaluation of their financial proposal. Once the bidder has been awarded the contract, they will then commence with the detailed design documentation of the semi-panel trailer (Refer to Volume 2, C5.1).

**Phase 1 and 2 Evaluation Summary Scoring Sheet**

<b>Evaluation Parameter</b>	<b>Maximum Score</b>	<b>Minimum Acceptance Score</b>	<b>Bidders Score</b>
Phase 1: Functionality and Technical Proposal Evaluation	80	57	
Phase 2: 3D Concept Model Presentation of the Semi Panel Trailer.	20	15	
<b>Total</b>	<b>100</b>	<b>72</b>	
Proceed to Evaluate Financial Proposal Documents	<i>Is bidders minimum acceptance score <math>\geq</math> 72 points (Yes/No)</i>		

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**T.2.2.15 REGISTRATION CERTIFICATE / AGREEMENT / ID DOCUMENT**

***Important note to Tenderer: The relevant supporting documents to the organization tendering i.e. Registration Certificates for Companies, Close Corporations and Partnerships, or Agreements and Powers of Attorney for Joint Ventures and Consortiums, or ID documents for Sole Proprietors, all as referred to in the foregoing forms and in T2.1, must be inserted here***

**INSERT HERE**

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## T2.2.16 AMENDMENTS, QUALIFICATIONS AND ALTERNATIVES

*(This is not an invitation for amendments, deviations or alternatives but should the Tenderer desire to make any departures from the provisions of this contract he shall set out his proposals clearly hereunder. Umgeni Water will not consider any amendment, alternative offers or discounts unless forms (a), (b) and (c) have been completed to the satisfaction of the Purchaser).*

I / We herewith propose the amendments, alternatives and discounts as set out in the tables below:

### (a) AMENDMENTS - NOT APPLICABLE

PAGE, CLAUSE OR ITEM NO.	PROPOSED AMENDMENT

- [Notes: (1) Proposals for amendments to the General and Special Conditions of Contract are not acceptable, and will be ignored;  
(2) The Tenderer must give full details of all the financial implications of the amendments and qualifications in a covering letter attached to his Tender.

### (b) ALTERNATIVES - NOT APPLICABLE

PROPOSED ALTERNATIVE	DESCRIPTION OF ALTERNATIVE

- [Notes: (1) Individual alternative items that do not justify an alternative Tender, and an alternative offer for time for completion should be listed here.  
(2) In the case of a major alternative to any part of the work, a separate Bill of Quantities, programme, etc., and a detailed statement setting out the salient features of the proposed alternatives must accompany the Tender.  
(3) Alternative Tenders involving technical modifications to the design of the works and methods of construction shall be treated separately from the main Tender offer.]

(c) UNCONDITIONAL DISCOUNTS

ITEM ON WHICH DISCOUNT IS OFFERED	DESCRIPTION OF DISCOUNT OFFERED

***[Note: The Tenderer must give full details of the discounts offered in a covering letter attached to his Tender, failing which, the offer for a discount may have to be disregarded.]***

Signature..... Date.....

## T2.2.17 RECORD OF ADDENDA TO TENDER DOCUMENTS

I / We confirm that the following communications amending the Tender documents that I / we received from Umgeni Water or his representative before the closing date for submission of Tenders have been taken into account in this Tender.

A signed copy of each addendum shall be inserted after this page.

ADDENDUM No	DATE	TITLE OR DETAILS

.....  
Signature  
(of person authorized to sign on behalf of the Tenderer)

.....  
Date

---

**T2.2.18 VAT REGISTRATION CERTIFICATE**

*[VAT Registration Certificate obtained from SARS to be inserted here]*

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## T2.2.19 SCHEDULE OF PROPOSED SUB-CONTRACTORS

**Important note to Tenderer: The relevant supporting documents to the organization tendering i.e. Registration Certificates for Companies, Close Corporations and Partnerships, or Agreements and Powers of Attorney for Joint Ventures and Consortiums, or ID documents for Sole Proprietors, all as referred to in the foregoing forms and in T2.1, must be inserted here**

We notify you that it is our intention to employ the following Sub-Contractors for work in this contract. If we are awarded a contract we agree that this notification does not change the requirement for us to submit the names of proposed Sub-Contractors in accordance with requirements in the contract for such appointments. If there are no such requirements in the contract, then your written acceptance of this list shall be binding between us.

	Name and address of proposed Sub-Contractor	Nature and extent of work	Previous experience with Sub-Contractor
1.			
2.			
3.			
4.			
5.			

Signature..... Date .....

Name..... Position .....

Tenderer.....

**T2.2.20 PROOF OF PURCHASE OF TENDER DOCUMENT**

**INSERT HERE**

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## **T2.2.21 GOODS AND SERVICES SOURCED INTERNATIONALLY**

### **INTRODUCTION**

The National Industrial Participation (NIP) Programme, which is applicable to all government procurement contracts that have an imported content, became effective on the 1 September 1996. The NIP policy and guidelines were fully endorsed by Cabinet on 30 April 1997. In terms of the Cabinet decision, all state and State Owned Entity purchases / lease contracts (for goods, works and services) entered into after this date, are subject to the NIP requirements. NIP is obligatory and therefore must be complied with. The Industrial Participation Secretariat (IPS) of the Department of Trade and Industry (DTI) is charged with the responsibility of administering the programme.

### **1. PILLARS OF THE PROGRAMME**

1.1 The NIP obligation is benchmarked on the imported content of the contract. Any contract having an imported content equal to or exceeding US\$ 10 million or other currency equivalent to US\$ 10 million will have a NIP obligation. This threshold of US\$ 10 million can be reached as follows:

- (a) Any single contract with imported content exceeding US\$10 million.  
or
- (b) Multiple contracts for the same goods, works or services each with imported content exceeding US\$3 million awarded to one seller over a 2 year period which in total exceeds US\$10 million.  
or
- (c) A contract with a renewable option clause, where should the option be exercised the total value of the imported content will exceed US\$10 million.  
or
- (d) Multiple Contractors of the same goods, works or services under the same contract, where the value of the imported content of each allocation is equal to or exceeds US\$ 3 million worth of goods, works or services to the same government institution, which in total over a two (2) year period exceeds US\$10 million.

1.2 The NIP obligation applicable to Contractors in respect of sub-paragraphs 1.1 (a) to 1.1 (c) above will amount to 30 % of the imported content whilst Contractors in respect of paragraph 1.1 (d) shall incur 30% of the total NIP obligation on a pro-rata basis.

1.3 To satisfy the NIP obligation, the DTI would negotiate and conclude agreements such as investments, joint ventures, sub-contracting, licensee production, export promotion, sourcing arrangements and research and development (R&D) with partners or Contractors.

1.4 A period of seven years has been identified as the time frame within which to discharge the obligation.

### **2. REQUIREMENTS OF THE DEPARTMENT OF TRADE AND INDUSTRY**

2.1 In order to ensure effective implementation of the programme, successful tenderers (Contractors) are required to, immediately after the award of a contract that is in excess of R10 million (ten million Rands), submit details of such a contract to the DTI for reporting purposes.

2.2 The purpose for reporting details of contracts in excess of the amount of R10 million (ten million Rands) is to cater for multiple contracts for the same goods, works or services; renewable contracts and multiple Contractors for the same goods, works or services under the same contract as provided for in paragraphs 1.1.(b) to 1.1. (d) above.

### **3. TENDER SUBMISSION AND CONTRACT REPORTING REQUIREMENTS OF TENDERERS AND SUCCESSFUL TENDERERS (CONTRACTORS)**

3.1 Tenderers are required to sign and submit this Section together with the tender on the closing date and time.

3.2 In order to accommodate multiple contracts for the same goods, works or services; renewable contracts and multiple Contractors for the same goods, works or services under the same contract

as indicated in sub-paragraphs 1.1 (b) to 1.1(d) above and to enable the DTI in determining the NIP obligation, successful tenderers (Contractors) are required, immediately after being officially notified about any successful tender with a value in excess of R10 million (ten million Rands), to contact and furnish the DTI with the following information:

- Tender / contract number.
- Description of the goods, works or services.
- Date on which the contract was accepted.
- Name, address and contact details of the government institution.
- Value of the contract.
- Imported content of the contract, if possible.

3.3 The information required in paragraph 3.2 above must be sent to the Department of Trade and Industry, Private Bag X 84, Pretoria, 0001 for the attention of Mr Elias Malapane within five (5) working days after award of the contract. Mr Malapane may be contacted on telephone (012) 3941401, facsimile (012) 3942401 or e-mail at [Elias@thedti.gov.za](mailto:Elias@thedti.gov.za) for further details about the programme.

#### 4. PROCESS TO SATISFY THE NIP OBLIGATION

4.1 Once the successful tenderer (Contractor) has made contact with and furnished the DTI with the information required, the following steps will be followed:

- (a) the Contractor and the DTI will determine the NIP obligation;
- (b) the Contractor and the DTI will sign the NIP obligation agreement;
- (c) the Contractor will submit a performance guarantee to the DTI;
- (d) the Contractor will submit a business concept for consideration and approval by the DTI;
- (e) upon approval of the business concept by the DTI, the Contractor will submit detailed business plans outlining the business concepts;
- (f) the Contractor will implement the business plans; and
- (g) the Contractor will submit bi-annual progress reports on approved plans to the DTI.

4.2 The NIP obligation agreement is between the DTI and the successful tenderer (Contractor) and, therefore, does not involve the purchasing institution.

Tender number .....	Closing date .....
Name of tenderer .....	
Postal address .....	
.....	
Signature .....	Name (in print) .....
Date .....	



**T2.2.21 GOODS AND SERVICES SOURCED INTERNATIONALLY** Continued.....

Insert detailed list of goods and services to be sourced internationally and provide rate of exchange and base date.

Description	Value	Base Date	Rate of Exchange
-------------	-------	-----------	------------------

Note to the Tenderer: It will be the successful Tenderer's responsibility to obtain Forward Cover to avoid price increases for the Employer on any goods and services in this category. In failing to do that, any increase in prices on these items, after the Commencement Date of the Contract, shall be for the Contractor's account.

## **T2.2.22 PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017**

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

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

### **1. GENERAL CONDITIONS**

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

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

1.2 The value of this tender is estimated not to exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 system shall be applicable.

1.3 Preference points for this tender shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contribution.  
(Refer Clause 5.7)

1.3.1 The maximum points for this tender are allocated as follows:

	POINTS
1.3.1.1 PRICE	80
1.3.1.2 B-BBEE STATUS LEVEL OF CONTRIBUTION	20
<b>Total points for Price and B-BBEE must not exceed</b>	
	<b>100</b>
1.4	Failure on the part of a tenderer to fill in and/or to sign this form and submit a B-BBEE Affidavit, Verification Certificate from a B-BBEE Verification Agency accredited by the South African National Accreditation System (SANAS) or a Registered Auditor approved by the Independent Regulatory Board of Auditors (IRBA), issued prior to 01 January 2017 together with the tender, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.5 The purchaser reserves the right to require of a 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 purchaser.

### **2. DEFINITIONS**

- 2.1 "all applicable taxes" includes value-added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies;
- 2.2 "B-BBEE" means broad-based black economic empowerment as defined in section 1 of the Broad -Based Black Economic Empowerment Act;
- 2.3 "B-BBEE status level of contributor" means the B-BBEE status received by a measured entity based on its overall performance using the relevant scorecard contained in the Codes of Good

- Practice, or Sector Code on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- 2.4 “tender” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of services, works or goods, through price quotations, advertised competitive tendering processes or proposals;
- 2.5 “Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- 2.6 “comparative price” means the price after the factors of a non-firm price and all unconditional discounts that can be utilized have been taken into consideration;
- 2.7 “consortium or joint venture” 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;
- 2.8 “contract” means the agreement that results from the acceptance of a tender by an organ of state;
- 2.9 “EME” – (Exempted Micro Enterprise) means an Entity with annual turnover of R10 million or less means any enterprise with an annual total revenue of R5 million or less.
- 2.10 “Firm price” means the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax, which, in terms of the law or regulation, is binding on the Supplier and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;
- 2.11 “functionality” means the measurement according to predetermined norms, as set out in the tender documents, of a service or commodity that is designed to be practical and useful, working or operating, taking into account, among other factors, the quality, reliability, viability and durability of a service and the technical capacity and ability of a tenderer;
- 2.12 “non-firm prices” means all prices other than “firm” prices;
- 2.13 “person” includes a juristic person;
- 2.14 “QSE” – (Qualifying Small Enterprise) means an Entity that qualifies for measurement under the QSE scorecard with turnover of R10 million or more but less than R50 Million.
- 2.15 “rand value” means the total estimated value of a contract in South African currency, calculated at the time of tender invitations, and includes all applicable taxes and excise duties;
- 2.16 “sub-contract” means the primary Supplier’s assigning, leasing, making out work to, or employing, another person to support such primary Supplier in the execution of part of a project in terms of the contract;
- 2.17 “total revenue” – means the total income of an entity from its operations as determined under South African Generally Accepted Accounting Practice, as per the Codes of Good Practice on Black Economic Empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act and promulgated in the Government Gazette on 9 February 2007;
- 2.18 “trust” means the arrangement through which the property of one person is made over or bequeathed to a trustee to administer such property for the benefit of another person; and
- 2.19 “trustee” means any person, including the founder of a trust, to whom property is bequeathed in order for such property to be administered for the benefit of another person.

### 3. ADJUDICATION USING A POINT SYSTEM

- 3.1 The tenderer obtaining the highest number of total points will be awarded the contract.
- 3.2 Preference points shall be calculated after prices have been brought to a comparative basis taking into account all factors of non-firm prices and all unconditional discounts;.
- 3.3 Points scored must be rounded off to the nearest 2 decimal places.
- 3.4 In the event that two or more tenders have scored equal total points, the successful tender must be the one scoring the highest number of preference points for B-BBEE.
- 3.5 However, when functionality is part of the evaluation process and two or more tenders have scored equal points including equal preference points for B-BBEE, the successful tender must be the one scoring the highest score for functionality.
- 3.6 Should two or more tenders be equal in all respects, the award shall be decided by the drawing of lots.

### 4. POINTS AWARDED FOR PRICE

#### 4.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

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

Where:

Ps = Points scored for comparative price of tender under consideration  
Pt = Comparative price of tender under consideration  
Pmin = Comparative price of lowest acceptable tender

### 5. Points awarded for B-BBEE Status Level of Contribution

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

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

- 5.2 Tenderers who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA, prior to 01 May 2015 or a B-BBEE Affidavit with B-BBEE Status Level Certificates.
- 5.3 Tenderers other than EMEs must submit their original and valid B-BBEE status level Affidavit QSE (for entities whose turnover is between R10 million and R50 million, with 51% to 100% Black Ownership) verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA (prior to 1 January 2017) or a Verification Agency accredited by SANAS.
- 5.4 A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate for consortiums or joint ventures and affidavit for trusts.
- 5.5 A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate tender.
- 5.6 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialised scorecard contained in the Amended B-BBEE Codes of Good Practice, Gazette No. 38766.
- 5.7 A person will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-Supplier is an EME that has the capability and ability to execute the sub-contract.
- 5.8 A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

## 6. TENDER DECLARATION

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

**7. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.3.1.2 AND 5.1**

7.1 B-BBEE Status Level of Contribution: ..... = ..... (maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA (prior to 01 January 2017) or an Accounting Officer as contemplated in the CCA).

**8. SUB-CONTRACTING**

8.1 Will any portion of the contract be sub-contracted? **YES / NO** (delete which is not applicable)

8.1.1 If yes, indicate:

- i. what percentage of the contract will be subcontracted? .....%
- ii. the name of the sub-Contractor? .....
- iii. the B-BBEE status level of the sub-Contractor? .....
- iv. whether the sub-Contractor is an EME? YES / NO (delete which is not applicable)

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

9.1 Name of organization: .....

9.2 VAT registration number: .....

9.3 Company Registration number: .....

9.4 TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One person business/sole propriety
- ☐ Close corporation
- ☐ Company
- ☐ (Pty) Limited

[TICK APPLICABLE BOX]

9.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

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

9.6 COMPANY CLASSIFICATION

- ☐ Manufacturer
- ☐ Contractor
- ☐ Professional service provider
- ☐ Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

9.7 Total number of years the company/firm has been in business? .....

9.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of contribution indicated in

paragraph 7 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- (i) The information furnished is true and correct
- (ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form
- (iii) In the event of a contract being awarded as a result of points claimed as shown in paragraph 7, the Contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- (iv) If the B-BBEE status level of contribution has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the 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) restrict the tenderer or Contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, 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

.....  
**SIGNATURE(S) OF TENDERER(S):**

DATE: .....

ADDRESS: .....

.....

.....

**WITNESSES:**

1. ....

2. ....

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**T2.2.22 .../continued B-BBEE STATUS LEVEL VERIFICATION CERTIFICATES**

Tenderers not submitting a **valid original or a certified copy** B-BBEE Status Level Verification Certificate or are non-compliant contributors to B-BBEE do not qualify for preference points for B-BBEE but will not be disqualified from the tendering process.

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**T2.2.23 LETTER OF GOOD STANDING IN TERMS OF COID ACT**

**(Compensation for Occupational Injuries and Diseases Act)**

**INSERT HERE**

**DRAFT**

#### T2.2.24 TENDERER'S FINANCIAL STANDING

**In terms of the standard conditions of Tender, the Tenderer shall provide information about its commercial position, which includes information necessary for the Purchaser to evaluate the Tenderer's financial standing.**

To that end the Tenderer must provide with its Tender a bank rating, certified by its banker, to the effect that it will be able to successfully complete the contract at the Tendered amount within the specified time for completion.

**However, should the Tenderer be unable to provide a bank rating with its Tender, it shall state the reasons as to why it is unable to do so, and in addition provide the following details of its banker and bank account that it intends to use for project:**

Name of account holder: .....

Name of Bank: ..... Branch: .....

Account number: ..... Type of account: .....

Telephone number: ..... Facsimile number: .....

Name of contact person (at bank: .....

***Failure to provide either the required bank details or a certified bank rating with its Tender, will lead to the conclusion that the Tenderer does not have the necessary financial resources at its disposal to complete the contract successfully within the specified time for completion.***

The Purchaser undertakes to treat the information thus obtained as confidential, strictly for the use of evaluation of the Tender submitted by the Tenderer.

SIGNATURE: ..... DATE: .....  
(of person authorized to sign on behalf of the Tenderer)

## T2.2.25 CONTRACTORS HEALTH AND SAFETY DECLARATION

In terms of Clause 5(1) 9(h) of the OHS Act 1993 Construction Regulations 2014 (referred to as "the Regulations" hereafter), a Contractor may only be appointed to perform construction work if the Purchaser is satisfied that the Contractor has the necessary competencies and resources to carry out the work safely in accordance with the Occupational Health and Safety Act No 85 of 1993 and the OHS Act 1993 Construction Regulations 2014.

To that effect a person duly authorized by the Tenderer must complete and sign the declaration hereafter in detail.

### Declaration by Tenderer

1. I the undersigned hereby declare and confirm that I am fully conversant with the Occupational Health and Safety Act No 85 of 1993 (as amended by the Occupational Health and Safety Amendment Act No 181 of 1993), and the OHS Act 1993 Construction Regulations 2014.
2. I hereby declare that my company / enterprise have the competence and the necessary resources to safely carry out the construction work under this contract in compliance with the Construction Regulations and the Purchaser's Health and Safety Specifications.
3. I hereby undertake, if my Tender is accepted, to provide a sufficiently documented Health and Safety Plan in accordance with CR7(1) of the Construction Regulations, approved by the Purchaser or its representative, before I will be allowed to commence with construction work under the contract. I hereby agree that my company/enterprise will not have a claim for compensation for delay or extension of time because of my failure to obtain the necessary approval for the said safety plan.
4. I confirm that copies of my company's approved Health and Safety Plan, the Purchaser's Safety Specifications as well as the OHS Act 1993 Construction Regulations 2014 will be provided on site and will at all times be available for inspection by the Contractor's personnel, the Purchaser's personnel, the Employer's Agent, visitors, and officials and inspectors of the Department of Labour.
5. I hereby confirm that adequate provision has been made in my Tendered rates and prices in the bill of quantities to cover the cost of all resources, actions, training and all health and safety measures envisaged in the OHS Act 1993 Construction Regulations 2014, including the cost for specific items that may be scheduled in the bill of quantities.
6. I hereby confirm that I will be liable for any penalties that may be applied by the Purchaser in terms of the said Regulations for failure on my part to comply with the provisions of the Act and the Regulations as set out in Regulation 30 of the Regulations.
7. I agree that my failure to complete and execute this declaration to the satisfaction of the Purchaser will mean that I am unable to comply with the requirements of the OHS Act 1993 Construction Regulations 2014, and accept that my Tender will be prejudiced and may be rejected at the discretion of the Purchaser.
8. I am aware of the fact that, should I be awarded the contract, I must submit the notification required in terms of Regulation 4 of the OHS Act 1993 Construction Regulations 2014 (*example attached hereafter*) before I will be allowed to proceed with any work under the contract.

SIGNATURE: ..... DATE: .....  
(of person authorized to sign on behalf of the Tenderer)

**T2.2.26 PRO FORMA OHS NOTIFICATION**

**PRO FORMA NOTIFICATION FORM IN TERMS OF THE OCCUPATIONAL HEALTH AND SAFETY  
ACT 1993, CONSTRUCTION REGULATIONS 2014**

***[In terms of Regulation 4 of the Construction Regulations 2014, the successful Tenderer must complete and forward this form prior to commencement of work to the office of the Department of Labour.]***

1. (a) Name and postal address of Contractor: .....
- (b) Name of Contractor's contact person: .....  
Telephone number: .....
2. Contractor's compensation registration number: .....
3. (a) Name and postal address of Purchaser: .....
- (b) Name of Purchaser's contact person or agent: .....  
Telephone number: .....
4. (a) Name and postal address of designer(s) for the project:.....  
.....
- (b) Name of designer's contact person: .....  
Telephone number .....
5. Name of Contractor's construction supervisor on site appointed in terms of Regulation 6(1):  
Telephone number: .....
6. Name/s of Contractor's sub-ordinate supervisors on site appointed in terms of regulation 6(2).  
.....
7. Exact physical address of the construction site or site  
office.....  
.....
8. Nature of the construction work: .....
9. Expected commencement date: .....
10. Expected completion date: .....
11. Estimated maximum number of persons on the construction site: .....
12. Planned number of Sub-Contractors on the construction site accountable to Contractor: .....
13. Name(s) of Sub-Contractors already chosen:  
.....  
.....

SIGNED BY:

CONTRACTOR: ..... DATE: .....

PURCHASER: ..... DATE: .....

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**T2.2.27 LETTER OF INTENT FOR PUBLIC LIABILITY**

**INSERT HERE**

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**T2.2.28 LETTER OF INTENT FOR PERFORMANCE GUARANTEE**

[The Tenderer must attach hereto a letter from the bank or institution with whom it has made the necessary arrangements, to the effect that the said bank or institution will be prepared to provide the required performance guarantee when asked to do so. The Tenderer must also attach proof that the institution that will provide the performance guarantee is registered and in good standing with the Financial Services Conduct Authority.]

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#### **T2.2.29 REGISTRATION CERTIFICATES**

Insert required registration Certificates such as CIDB, ECSA, PSIRA, and the like here.

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**T2.2.30 CENTRAL SUPPLIER DATABASE (CSD) REPORT**

INSERT HERE

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**Disclaimer**

Personal Information (PI) requested in this form is mandatory for operational and administrative processes, and to comply with regulatory requirements. Umgeni Water will take reasonable steps to ensure that the Personal Information collected on this form is processed responsibly, kept safe and confidential, and does not unjustifiably infringe your privacy. This is in compliance to the Protection of Personal Information Act No. 4 of 2013.