



**BID DOCUMENT**

**PANEL FOR PROFESSIONAL SERVICES PROVIDERS TO RENDER MULTI-DISCIPLINARY SERVICES FOR AMATOLA WATER COVERING: CIVIL, STRUCTURAL, MECHANICAL, ELECTRICAL ENGINEERING & ENGINEERING MANAGEMENT SERVICES FOR A PERIOD OF THREE (3) YEARS.**

**BID No. AW 2023/24/04**

**CLOSING DATE: 02 April 2024 AT 11H00**

ISSUED AND PREPARED BY:

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<b>BIDDER TO COMPLETE</b>	
<b>Name of the Tenderer</b>	
<b>CSD number</b>	

**Bidders are required to select one category they intend on bidding from the table below:**

<b>CATEGORY</b>	<b>VALUE OF WORK (MILLION)</b>	<b>SELECTION OF CATEGORY BY BIDDER</b>
<b>A</b>	<b>R 1 to R 50 000 000</b>	
<b>B</b>	<b>R 50 000 001 to R 100 000 000</b>	
<b>C</b>	<b>R 100 000 001 to unlimited</b>	

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# **PART T1: TENDERING PROCEDURES**

## TENDER NOTICE AND INVITATION TO TENDER

PANEL FOR PROFESSIONAL SERVICES PROVIDERS TO RENDER MULTI-DISCIPLINARY SERVICES FOR AMATOLA WATER COVERING: CIVIL, STRUCTURAL, MECHANICAL, ELECTRICAL ENGINEERING & ENGINEERING MANAGEMENT SERVICES FOR A PERIOD OF THREE (3) YEARS.

### Tender No. AW2023/24/04

Amatola Water Board is a state-owned, South African water utility established in November 1997 and is mandated to render water services to water sector institutions, to local government and other customers in the Eastern Cape.

### INVITATION AND SCOPE OF WORK

Suitably experienced, qualified, and registered Professional Service Providers to participate in the Panel for Professional Services providers to render multi-disciplinary services for Amatola Water covering civil, structural, mechanical, electrical engineering & engineering management services for a period of three (3) years.

Only Bidders with the required company experience, the designated suitably registered Professional Persons in accordance with the relevant South African legislature for Professionally Registered Persons and in terms of the relevant professional bodies and quality management system and procedures, are eligible to submit tenders.

### COMPULSORY CLARIFICATION MEETING

A compulsory clarification meeting with representatives of the Employer will take place on the **15<sup>th</sup> March 2024 at 11:00am**. The meeting will be held at **Nahoon Dam Boathouse, (Co-Ordinates: 32°54'11.46" S 27°48'38.99"E)**. Any Bidder who arrives fifteen (15) minutes after the commencement of tender briefing will be not allowed to participate in the clarification meeting. A roll call will be conducted at end of the briefing session, and each Bidder may only be represented by one representative, Bidders which do not respond during the roll call will be deemed to have not attended the compulsory clarification meeting and will not be considered for evaluation.

### TENDER CONDITIONS

- The Preferential Procurement Policy Framework Act 2000 (PPPFA) principles shall apply, whereby submissions will be evaluated accordingly to the provisions of the Act as amended in 2022 however, no pricing is required at this stage.
- Bids are to be completed in accordance with the conditions and rules contained in the bid documents.
- It will be a contractual obligation for all RFQ's to be issued under this panel that 30% of the works needs to be sub-contracted to QSE and EMEs in accordance with the Supply Chain Management policy of AW. Where that is required, the service provider will be required to develop training and management plans for the appointed EMEs and QSEs for the consultancy work and further develop, manage, and supervise the work associated with the subcontracting of the works to EMEs and QSEs during the construction.
- Tenders which are late, incomplete, unsigned, or submitted electronically will not be accepted.
- All tenders are to remain valid for a period ninety (90) days from the closing date of the submission.
- A Tax Compliance status PIN (an original valid SARS certificate) must be submitted with the tender document to be considered.
- Failure to provide supplementary information specified and completion of the returnable schedules will result in the tender being regarded as non-responsive.
- Amatola Water does not bind itself to accept the lowest or any tender and reserves the right to accept any tender or portion of tender.

## **TENDER PUBLICATION**

Tender documents shall be downloaded for free from Amatola Water website and National Treasury website (E-Tender portal) at **09:00am on Friday the 08<sup>th</sup> March 2024**.

## **TENDER SUBMISSION**

The original completed bid documents plus one complete duplicate copy of Tender of the original and all supporting documents (in a separate file), must be submitted in a sealed envelope or parcel endorsed with the Bid Number and Bid Description as detailed in the Tender Data. The sealed envelope must be deposited in the Bid/Tender Box located in the reception area of **Amatola House, 6 Lancaster Rd, Vincent, East London** on **02<sup>nd</sup> April 2024 at 11:00am**, prior to the closing time. The bid submissions will be opened in public shortly after the closing time.

## **Tender Enquiries**

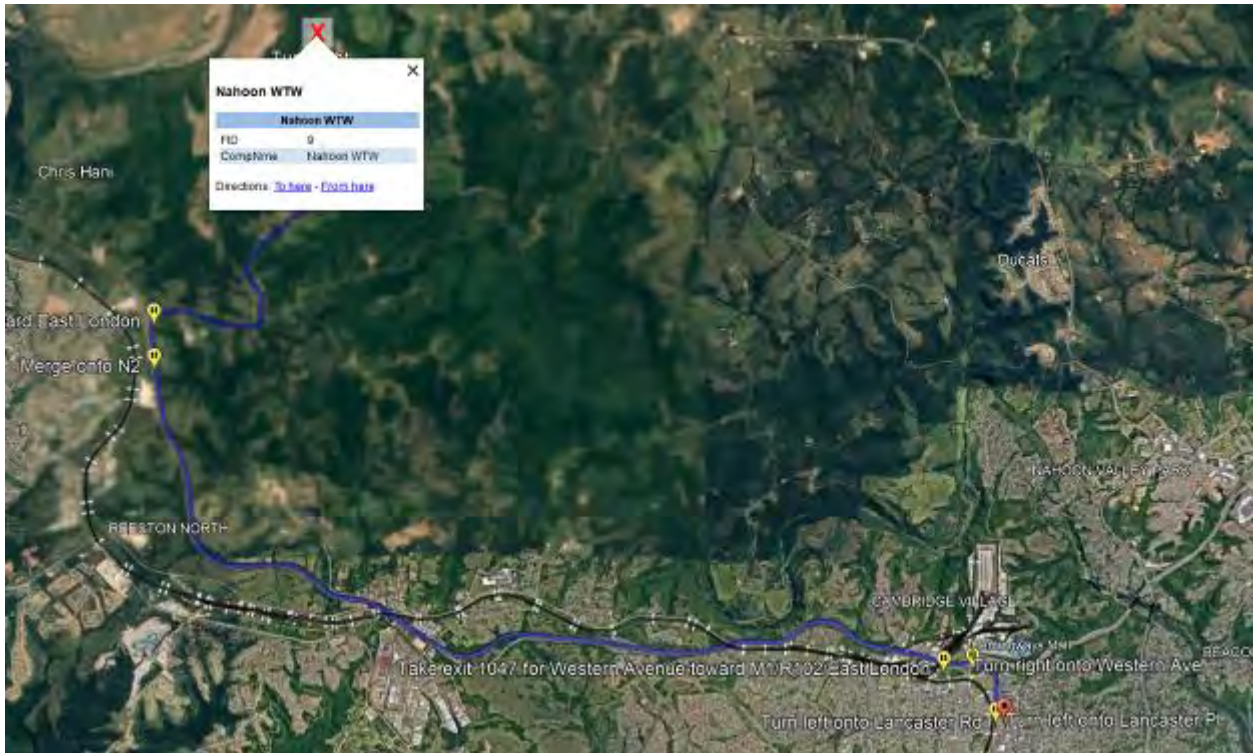
No telephonic enquiries relating to this tender will be entertained. All enquiries regarding this tender must be in writing only and must be directed to: Ms N. Ndlamla e-mail: [nndlamla@amatolawater.co.za](mailto:nndlamla@amatolawater.co.za)

**Mr S. Koyo**

**Chief Executive**

*Amatola Water supports transformation through Preferential Procurement and tenders will be awarded in accordance with Amatola Water's Supply Chain Management Policy.*

## LOCALITY PLAN: CLARIFICATION MEETING VENUE



(Co-Ordinates: **32°54'11.46" S 27°48'38.99"E**)

## T1.2 Tender Data

The conditions of tender are the Standard Conditions of Tender as contained in Annex C of Board Notice of 2019, Construction Industry Development Board (CIDB) Standard for Uniformity in Construction Procurement. (See [www.cidb.org.za](http://www.cidb.org.za)) which are reproduced without amendment or alteration for the convenience of Tenderers as an Annexure to this Tender Data.

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	Data
<b>C.1</b>	<b>GENERAL</b>
C.1.1	The Employer is: <b>Amatola Water Board</b>
C.1.3	Add the following to C1.3.3 A tendered sum may be regarded as being unduly low should it be considered to compromise the ability of a consultant to execute the contract i.e., it presents an unacceptable commercial risk to the Employer, or the Consultant will have insufficient financial capability to perform the contract.
C.1.2	The Tender Document for this Contract comprises the following: <ol style="list-style-type: none"> <li>1. The Standard Professional Services Contract (July 2009) (Edition 3 of CIDB document 1015) as published by the Construction Industry Development Board. Tenderers must obtain copies at their own cost from the Construction Industry Development Board Pretoria, Tel. (012) 343 7136 or (012) 481 9030, Fax: (012) 343 7153, e-mail: <a href="mailto:cidb@cidb.org.za">cidb@cidb.org.za</a>.</li> <li>2. The Preferential Procurement Policy Framework Act, 2000: Preferential Procurement Regulations, 2022.</li> <li>3. This tender document as provided by the Employer and available from the office of the Amatola Water Board.</li> </ol>
C.1.4	The Employer's Agent: Ms. Bulelwa Leni Address: Amatola Water 6 Lancaster Rd, Vincent, East London, 5200 Telephone: 043 707 3792 Fax: 043 707 3701 E-mail: <a href="mailto:bleni@amatolawater.co.za">bleni@amatolawater.co.za</a>
C.1.6.1	<b>General</b>  Add the following:  The purpose of this bid is for AW to establish a panel of professional service providers to render multi-disciplinary services to AW for the design, construction monitoring, contract administration, operation and maintenance of water related infrastructure. The departments in AW that will be utilising this panel is the Amatola Water Primary Business and the

Clause number	Data
	<p data-bbox="432 208 1410 271">Secondary Business. The panel will be subdivided into three categories based on the value of the construction works.</p> <p data-bbox="432 331 1410 427">The panel will be utilized for the value of the project in line with the scope for a period of three (03) years and linked to specific project duration until completion (services shall not be limited by the panel period) of the works.</p> <p data-bbox="432 488 1410 584">Following the closing of this bid, a bid evaluation process will commence, and the bid evaluation process will be undertaken as outlined in this tender document.</p> <p data-bbox="432 645 1410 775">Clause C.2.1.4.6 and Clause C.3.8 outline how the evaluation and appointment process will be undertaken. Following the appointment of the responsive and compliant Bidders to each Category of the Panel, AW will then utilise the established panel for a period of three years as follows:</p> <ul data-bbox="483 835 1410 2067" style="list-style-type: none"> <li data-bbox="483 835 1410 999">• The User Departments will submit a project specific requisition/specification to Supply Chain Unit with budget confirmation. Specification must be recommended by Executive Manager of the user department and approved by CE before the request process is implemented.</li> <li data-bbox="483 1014 1410 1111">• The request for quotation shall be sent for specification projects to all panel PSP in either category depending on the estimated construction cost developed by the End-User department.</li> <li data-bbox="483 1126 1410 1189">• SCM Unit will then send a request to applicable category listed requesting them to submit a quotation/proposal.</li> <li data-bbox="483 1205 1410 1301">• The panel PSPs will be given a minimum of five (5) working days to respond to the request for quotation depending on the complexity of the project.</li> <li data-bbox="483 1317 1410 1413">• The Service Provider will respond by submitting a detailed technical and price proposal or as per the requirements of the specification and deposit on the tender box.</li> <li data-bbox="483 1429 1410 1861">• Upon receiving prices for the specific projects, the evaluation shall be on price and preference as per the PPR 2022. The highest scoring Bidder will be appointed. The allocation and distribution of work to the panel will be done in a manner that is fair, equitable, transparent, competitive, and cost-effective following the applicable National Treasury regulation and prescripts. The number of projects that a Bidder in the panel has already been allocated through the panel will be strictly monitored to ensure that work is distributed in a fair, equitable, transparent, competitive, and cost-effective manner. This means that if a Bidder has already been allocated work from the panel by being a highest points scorer in multiple request proposals/quotations, consideration will be given to Bidders who have not been previously allocated work.</li> <li data-bbox="483 1877 1410 2067">• Where applicable, the assignments will comprise of either standalone studies or comprehensive design and construction monitoring assignments. In view of the distinct nature of these two types of assignments, the selection of the PSPs from the panel will be treated differently. In terms of studies, key resource requirements required for the studies may be adjusted and</li> </ul>



Clause number	Data
	supplemented to meet the requirements of the studies to be undertaken. For example, the requirements for key resources required may be adjusted in the Request for Proposal / Quotation to meet the requirements for Blue Drop, Green Drop and No Drop requirements should the relevant End-User Department be accessing the panel to under a study linked to these regulations or any other study that is linked to scientific research study or similar nature required to be in place at AW for compliance requirements.
C.1.6.2	A competitive negotiation procedure will not be followed.
C.1.6.3	A two staged system will not be followed.
C2.2	<b><i>Tenderer's Obligations</i></b>
C.2.1	Eligibility
C.2.1.1	<p><i>Delete the clause and replace with the following:</i></p> <p>Tenderer's must submit a tender offer that complies in all aspects to the conditions detailed in this document. Only those tenders that comply in all aspects with the tender conditions, specifications, pricing instructions and contract conditions shall be declared responsive.</p>
C.2.1.3	<p><i>Add the following after C.2.1.2:</i></p> <p>Only those tender submissions from which it can be established that a clear and unambiguous offer has been made to Employer, by whom the offer has been made, and what the offer constitutes, will be declared responsive.</p>
C.2.1.4	Only those tenders that satisfy the following criteria will be declared responsive:
C.2.1.4.1	<p><b>Joint Ventures are eligible to submit a tender offer provided that:</b></p> <ol style="list-style-type: none"> <li>1) Tenders submitted by joint ventures of two or more firms must be accompanied by the document of formation of the joint venture, authenticated by a notary public or other official deputed to witness sworn statements, in which it defines precisely the conditions under which the joint venture will function, its period of duration, the persons authorised to represent and obligate it, the participation of the several firms forming the joint venture, and any other information necessary to permit a full appraisal of its functioning.</li> <li>2) The Tenderer, if a Joint Venture, must submit a signed JV Agreement with the tender specific to the tendered Contract and clearly showing the percentage contribution of each partner to the Joint Venture.</li> <li>3) The agreement must also state the JV bank account details where payments will be deposited in the JV letter head and signed by the authorized person from each JV partner.</li> </ol>
C.2.1.4.2	<p><b>National Treasury Central Supplier Database Registration</b></p> <p>Only Tenderers who are currently registered on the National Treasury Central Supplier (CSD) Database and have provided proof of their registration will be eligible to submit a tender offer. Proof of registration must be in the form of the Tenderer's CSD registration number. Tenderers who are not registered are not precluded from submitting bids but must be</p>

Clause number	Data
	<p>registered prior to Contract Award.</p> <p>In the case of Joint Venture partnerships, this requirement will apply individually to each party to the Joint Venture.</p> <p>Tenderers who wish to register as service providers on the CSD can register online at <a href="https://secure.csd.gov.za/Account/Register">https://secure.csd.gov.za/Account/Register</a>.</p> <p>For further enquiries contact the Supply Chain Management Unit on Tel: 043 707 3700</p>
C.2.1.4.3	<p><b>Tenderer's Tax Clearance Certificate</b></p> <p>Tenderers shall be registered and in good standing with the South African Revenue Services (SARS).</p> <p>Each party to a Consortium/Joint Venture shall submit a separate Tax Clearance PIN Number and/or Tax Number.</p>
C.2.1.4.4	<p><b>Attendance of Compulsory Clarification Meeting</b></p> <p>Only Tenderers who have attended the compulsory Clarification Meeting and who have signed the attendance register at the compulsory Clarification Meeting and who are present when the roll call is made at the end of the meeting, will be eligible to submit a tender offer.</p>
C.2.1.4.5	<p><b>Compliance with Requirements of Amatola Water SCM Policy and Procedures</b></p> <p>Only those tenders that are compliant with the requirements below will be declared responsive:</p> <ol style="list-style-type: none"> <li>1. Registration with CSD – Compliance in terms of restriction and taxes;</li> <li>2. VAT registration number (if any) to be provided;</li> <li>3. A completed Certificate of Authority for Partnerships / Joint Ventures / Consortiums to be provided authorizing the tender to be made and the signatory to sign the tender on the partnership / joint venture / consortium's behalf (applicable schedule to be completed);</li> <li>4. A copy of the partnership / joint venture / consortium agreement to be provided;</li> <li>5. SBD4 - A completed Bidder's Disclosure Form to be provided;</li> <li>6. The tenderer's tax matters with SARS are in order;</li> <li>7. The Tenderer is not an advisor or consultant contracted with the Employer.</li> <li>8. The Tenderer is not a person, advisor, corporate entity or a director of such corporate entity, involved with the bid specification committee.</li> </ol>
C.2.1.4.6	<p><b>Minimum Capability Requirement and Compliance Verification</b></p> <p>Bidders are required to select one category they intend on bidding on from the table below. Once the selection has been made, the evaluation for responsiveness will be made by AW based on the category the Bidder has selected. Failure to select a category or selecting more than one category will result in the Bidder being regarded as non-responsive and being disqualified from the procurement process.</p>

Clause number	Data		
	<b>CATEGORY</b>	<b>VALUE OF WORK</b>	<b>Tick ONE (x)</b>
	A	R 1 to R 50 000 000	
	B	R 50 000 001 to R 100 000 000	
	C	R 100 000 001 to unlimited	
	<p>Prospective Tenderers will only be eligible to submit a tender if the Tenderer has the minimum similar project experience and suitably qualified and experienced personnel to undertake the project(s) in the panel the Tenderer is bidding on.</p> <p>The minimum compliance requirements for the bid are as follows:</p> <p><b>KEY PERSONNEL / RESOURCES</b></p> <p>A key personnel / resource is defined as the key personnel within the employ of the company, with the required qualification, experience, and registration in the required field, that will be responsible for executing and taking responsibility for the works as defined in the scope of works at the time of appointment.</p> <p>Certified academic qualifications certificates and a CV showing relevant experience only for each personnel required must be provided. Bidders should only submit the minimum required personnel as per the table above. It is not necessary to show the full staff complement of the Bidder. The CV of the proposed personnel must only show the relevant experience per role. Failure to comply to the requirements of the CV will render the Bidder as non-responsive in terms of this requirement.</p> <p><b>Requirements for Category A</b></p>		
<b>Evaluation Criteria</b>	<b>Details</b>	<b>Documentary Proof to be attached in the submission and used for evaluation</b>	
<b>Company Experience:</b>	<p>Implemented as the Main Consultant or the appointed QSE or EMEs traceable projects in South Africa, for Water Infrastructure in feasibility, master planning, project implementation readiness, technical analysis, design, construction monitoring, project management.</p> <p>Tenderers to provide signed reference letters for successfully completed projects</p>	<p>Company profile reflecting relevant experience.</p> <p>Completed, signed, and stamped reference forms as contained in the tender document or alternatively reference letters from the Client clearly indicating the client details, working contact details and project details that will allow for ease of evaluation.</p>	

Clause number	Data		
		<p>within the last ten (10) years.</p> <p>The number of successfully completed projects with the cost of the works similar to the category the Bidder is tendering for required is as follows:</p> <p>Category A: Value of Works up to R50million, number of completed projects is two.</p>	
	<p><b>Key Personnel:</b></p>	<p>Project Director (Employers Agent)</p> <p>Minimum education, experience and professional registrations required:</p> <p>Professional registration as Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum education Qualification at NQF Level 7 or higher required in Engineering. or Project Management or Construction Management.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects.</p>	<p>Detailed CV and certified copy of qualifications.</p> <p>Certified copy of proof of membership</p> <p>Technical Qualifications and Experience (Company Organogram to be attached, clearly showing the role of the nominated official.</p> <p>Bidders are to utilize the CV format template provided.) All professional registrations are to be fully active throughout the procurement</p>
		<p>Employers Agent Representative.</p> <p>Minimum education and professional registrations required:</p> <p>The minimum education requirements for this</p>	

Clause number	Data		
		<p>role is a BTech in Engineering or higher.</p> <p>Professional registration as Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of seven (7) years' experience in water and sanitation related projects</p>	<p>process and panel period.</p>
		<p>Engineering Technician</p> <p>Minimum education, experience and professional registrations required:</p> <p>The minimum education requirements for this role is a National Diploma in Engineering or higher.</p> <p>Professional registration as Pr. Tech Eng or Pr. Techni.</p> <p>Minimum of five (5) years' experience in water and sanitation related projects.</p>	
	<p><b>Quality Management System</b></p>	<p>Professional Service Provider Quality Management plan or system evidence by providing proof of ISO certification or proof of quality management system deployed within the organization.</p>	<p>ISO 9001 Certification or Proof of Quality Management System that the Company has.</p>
	<p><b>Professional Indemnity</b></p>	<p>The tendering entity has professional indemnity insurance cover issued by a reputable South African insurer in an amount of not less than <b>R 2.5 million</b> in</p>	<p>Proof of valid Professional Indemnity which conforms to the required amount.</p>

Clause number	Data		
		<p>respect of a claim without limiting to the number of claims or show documentary evidence (proposal / quotation) of having applied for such cover.</p>	
	<p><b>Requirements for Category B</b></p>		
	<p><b>Evaluation Criteria</b></p>	<p><b>Details</b></p>	<p><b>Documentary Proof to be attached in the submission and used for evaluation</b></p>
	<p><b>Company Experience:</b></p>	<p>Implemented as the Main Consultant or the appointed QSE or EMEs traceable projects in South Africa, for Water Infrastructure in feasibility, master planning, project implementation readiness, technical analysis, design, construction monitoring, project management.</p> <p>Tenderers to provide signed reference letters for successfully completed projects within the last ten (10) years.</p> <p>The number of successfully completed projects with the cost of the works similar to the category the Bidder is tendering for required is as follows:</p> <p>Category B: Value of Works from R50million to R100million, number of completed projects is three.</p>	<p>Company profile reflecting relevant experience.</p> <p>Completed, signed, and stamped reference forms as contained in the tender document or alternatively reference letters from the Client clearly indicating the client details, working contact details and project details that will allow for ease of evaluation.</p>

Clause number	Data	
	<p><b>Key Personnel:</b></p>	<p>Project Director (Employers Agent)</p> <p>Minimum education and professional registrations required:</p> <p>Professional registration as Pr. Eng, or Pr. Tech Eng, and Pr. CPM on SACPCMP or PMP certification</p> <p>Minimum education Qualification at NQF Level 7 or higher required in Engineering. or Project Management or Construction Management.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post receiving the minimum educational qualification required by the tender (i.e. BTech or BEng or BSc).</p> <hr/> <p>Project Manager</p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in</p>

Detailed CV and certified copy of qualifications.

Certified copy of proof of membership

Technical Qualifications and Experience (Company Organogram to be attached, clearly showing the role of the nominated official.

Bidders are to utilize the CV format template provided.) All professional registrations are to be fully active throughout the procurement process and panel period.

Clause number	Data	
		<p>water and sanitation related projects post receiving the minimum educational qualification required by the tender (i.e. BTech or BEng or BSc).</p> <p>Design Engineer: Civil</p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post receiving the minimum educational qualification required by the tender (i.e. BTech or BEng or BSc).</p> <p>Design Engineer: Structural</p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional</p>



Clause number	Data	
		<p>registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post receiving the minimum educational qualification required by the tender (i.e. BTech or BEng or BSc).</p> <hr/> <p><b>Design Engineer: Mechanical</b></p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post receiving the minimum educational qualification required by the tender (i.e. BTech or BEng or BSc).</p> <hr/> <p><b>Design Engineer: Electrical</b></p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this</p>

Clause number	Data		
		<p>role is a BTech in Engineering or higher.</p> <p>Professional registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post receiving the minimum educational qualification required by the tender (i.e. BTech or BEng or BSc).</p>	
	<b>Quality Management System</b>	Professional Service Provider Quality Management plan or system evidence by providing proof of ISO certification or proof of quality management system deployed within the organization.	ISO 9001 Certification or Proof of Quality Management System that the Company has.
	<b>Professional Indemnity</b>	The tendering entity has professional indemnity insurance cover issued by a reputable South African insurer in an amount of not less than <b>R 5 million</b> in respect of a claim without limiting to the number of claims or show documentary evidence (proposal / quotation) of having applied for such cover.	Proof of valid Professional Indemnity which conforms to the required amount.
	<b>Requirements for Category C:</b>		
	<b>Evaluation Criteria</b>	<b>Details</b>	<b>Documentary Proof to be attached in the submission and used for evaluation</b>

Clause number	Data		
	<p><b>Company Experience:</b></p>	<p>Implemented as the Main Consultant or the appointed QSE or EMEs traceable projects in South Africa, for Water Infrastructure in feasibility, master planning, project implementation readiness, technical analysis, design, construction monitoring, project management.</p> <p>Tenderers to provide signed reference letters for successfully completed projects within the last ten (10) years.</p> <p>The number of successfully completed projects with the cost of the works similar to the category the Bidder is tendering for required is as follows:</p> <p>Category C: Value of Works from R100million to unlimited, number of completed projects is four.</p>	<p>Company profile reflecting relevant experience.</p> <p>Completed, signed, and stamped reference forms as contained in the tender document or alternatively reference letters from the Client clearly indicating the client details, working contact details and project details that will allow for ease of evaluation.</p>
	<p><b>Key Personnel:</b></p>	<p>Project Director (Employers Agent)</p> <p>Minimum education and professional registrations required:</p> <p>Professional registration as Pr. Eng, or Pr. Tech Eng, and Pr. CPM on SACPCMP or PMP certification</p> <p>Minimum education Qualification at NQF</p>	<p>Detailed CV and certified copy of qualifications.</p> <p>Certified copy of proof of membership</p> <p>Technical Qualifications and Experience (Company Organogram to be attached, clearly showing the role of the nominated official.</p>

Clause number	Data		
		<p>Level 7 or higher required in Engineering. or Project Management or Construction Management.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post professional registration.</p>	<p>Bidders are to utilize the CV format template provided.) All professional registrations are to be fully active throughout the procurement process and panel period.</p>
<p>Project Manager</p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post professional registration.</p>			
<p>Design Engineer: Civil</p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional</p>			

Clause number	Data	
		<p>registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post professional registration.</p> <p><b>Design Engineer: Structural</b></p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post professional registration.</p> <p><b>Design Engineer: Mechanical</b></p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10)</p>

Clause number	Data		
		<p>years' experience in water and sanitation related projects post professional registration.</p>	
		<p>Design Engineer: Electrical</p> <p>Minimum education, minimum experience and professional registrations required:</p> <p>The minimum education requirements for this role is a BTech in Engineering or higher.</p> <p>Professional registration as a Pr. Eng, or Pr. Tech Eng.</p> <p>Minimum of ten (10) years' experience in water and sanitation related projects post professional registration.</p>	
	<p><b>Quality Management System</b></p>	<p>Professional Service Provider Quality Management plan or system evidence by providing proof of ISO certification or proof of quality management system deployed within the organization.</p>	<p>ISO 9001 Certification or Proof of Quality Management System that the Company has.</p>
	<p><b>Professional Indemnity</b></p>	<p>The tendering entity has professional indemnity insurance cover issued by a reputable South African insurer in an amount of not less than <b>R10 million</b> in respect of a claim without limiting to the number of claims or show documentary</p>	<p>Proof of valid Professional Indemnity which conforms to the required amount.</p>

Clause number	Data			
	<table border="1" data-bbox="435 203 1401 389"> <tr> <td data-bbox="435 203 759 389"></td> <td data-bbox="759 203 1082 389">evidence (proposal / quotation) of having applied for such cover.</td> <td data-bbox="1082 203 1401 389"></td> </tr> </table> <p>Bidders who are deemed responsive in terms of the evaluation criteria set out above will be appointed to the categories they have tendered for. A bidder will be appointed to the panel category they have selected. A contract will be concluded with bidders who in terms of the mandatory requirements for the bid are deemed responsive and have the necessary company experience and personnel as set out in the compliance requirements for the bid.</p> <p>It needs to be noted that AW using discretion, in the case that the minimum number of panel members (PSPs) are not met on lower categories, it shall be supplemented by higher listed category PSPs for establishment of lower categories.</p>		evidence (proposal / quotation) of having applied for such cover.	
	evidence (proposal / quotation) of having applied for such cover.			
C.2.6 Acknowledge Addenda	All Tenderers to acknowledge receipt of any Addenda issued and to complete and sign Record of Addenda to Tender Documents in the Returnable Schedules. Failure to apply instruction will render a Tenderer's offer non-responsive.			
C.2.7 Clarification Meeting	<p>The arrangements for a <b><u>COMPULSORY</u></b> information session are stated in the Tender Notice and Invitation to Tender.</p> <p>Tenderers must sign the attendance list in the name of the tendering entity or entity which will be part of the JV / Consortium.</p> <p>Addenda will be issued to, and tenders will be received only from those tendering entities appearing on the attendance list.</p>			
C.2.8 Seek clarification	No telephonic or any other form of communication with any other Amatola Water member of staff, other than the named individuals on the tender advert, relating to this request for the tender will be permitted. All enquiries regarding this tender must be in writing only and must be directed to all the named individuals.			
C2.10 Pricing The Tender Offer	Pricing of bids and pricing instructions will be distributed during the stage of this bid where successful Bidders are requested to price during the Request for Quotation stage (RfQ)			
C2.10.2 Pricing The Tender Offer	Non-VAT vendors who submit bids for contracts that would, if successful, take their annual turnover above the threshold of R 1 million are obliged to include VAT in the prices quoted and must therefore immediately upon award of the contract register with the South African Revenue Service (SARS) as VAT vendors. The award of contract would be conditional pending the successful Bidder submitting proof of registration as a VAT vendor with SARS			
C.2.11 Alterations to Documents	<p><b>Add the following:</b></p> <p>In the event of an error having been made on the pricing schedule, it shall be crossed out in non-erasable ink and shall be accompanied by an initial of each signatory to the Tender at each and every price alteration.</p> <p>If correction fluid has been used on any specific item price, such item will</p>			

Clause number	Data
	not be considered. Corrections in terms of price may not be made by means of correction fluid such as Tippex or similar product. No correction fluid may be used in a Price Schedule where prices are calculated to arrive at a total amount. If correction fluid has been used, the tender as a whole will be classified non-responsive and shall not be considered
C.2.12 Alternative Tender Offers	Alternative tender offers will NOT be considered.
C.2.13.1 Submitting a Tender Offer	Submission of a "Copy" of the tender offer is NOT compulsory
C.2.13.3 Submitting a Tender Offer	<b>Add the following to C.2.13.3 at the end of the first sentence:</b> Parts of each tender offer communicated on paper shall be submitted as an original, plus all supporting documents. No duplicate copy is required.
C.2.13.4 Submitting a Tender Offer	<b>Add the following to C.2.13.4:</b> Only authorized signatories may sign the original and all copies of the tender offer where required in terms of C.2.13.3.  In the case of a <b>COMPANY</b> submitting a tender, include a copy of a resolution by its Board of Directors authorizing a Director or other official of the company to sign the documents on behalf of the company.  In the case of a <b>PARTNERSHIP</b> submitting a tender, all the partners shall sign the documents, unless one partner or a group of partners has been authorized to sign on behalf of each partner, in which case proof of such authorization shall be included in the Tender.  In the case of a <b>JOINT VENTURE / CONSORTIUM</b> submitting a tender, include a resolution of each company of the Joint Venture together with a resolution by its members authorizing a member of the Joint Venture to sign the documents on behalf of the Joint Venture.
C.2.13.5 Submitting a Tender Offer	The Employer's address for delivery of bid offers and identification details to be shown on each bid offer package are: <b>Bid box at the</b> Amatola House, 6 Lancaster Rd, Vincent, East London, 5200 <b>Identification details:</b> <b>CONTRACT NUMBER: AW2023/24/04</b> <b>Description of project:</b> PANEL FOR PROFESSIONAL SERVICES PROVIDERS TO RENDER MULTI-DISCIPLINARY SERVICES FOR AMATOLA WATER COVERING: CIVIL, STRUCTURAL, MECHANICAL, ELECTRICAL ENGINEERING & ENGINEERING MANAGEMENT SERVICES FOR A PERIOD OF THREE (3) YEARS.
C.2.13.6 Submitting a Tender Offer	This tender will follow a competitive selection procedure (two-envelop system will not apply)
C.2.13.9 Submitting a	Telephonic, telegraphic, telex, facsimile or e-mailed bid submissions will



<b>Clause number</b>	<b>Data</b>
Tender Offer	not be accepted.
C.2.15 Closing Time	Add C2.15.3 The closing time for submission of bid offers is as stated in the Tender Notice and Invitation to Tender. No tender offers will be accepted after closing time stated in the Tender Date.
C.2.16 Tender Offer Validity	The bid offer validity period is <b>90 days</b> .
C.2.18 Provide Other Material	Any additional information requested under this clause must be provided within <b>5 (five) working days</b> of date of request.
<b>C.3</b>	<b>THE EMPLOYER'S UNDERTAKINGS</b>
C.3.1 Respond to requests from the Tenderer	Replace the following wording... five (5) working days with seven (7) working days
C.3.2 Issue Addenda	<b><i>Amend C.3.2 as follows:</i></b> Change "three (3)" working days to read "five (5)" working days.  <b><i>Add the following to C.3.2, at the end of the paragraph:</i></b> Notwithstanding any requests for confirmation of receipt of Addenda issued, the tenderer shall be deemed to have received such addenda if the Employer can show proof of transmission thereof (or a notice in respect thereof) via electronic mail, facsimile or registered post.  The Employer or his Agent shall not be held liable or responsible for non-receipt of any Addenda issued (and consequent rejection of tender submitted) where communication of such Addenda using the supplied contact e-mail address fails for whatever reason.
C.3.4 Opening Of Bid Submissions	Tenders will be opened on the <b>same day at tender close at Amatola House, 6 Lancaster Rd, Vincent, East London.</b>
C.3.5 Two-Envelope System	A two-envelope procedure will <b>NOT</b> be followed.
C.3.7 Grounds for Rejection and Disqualifications	<b><i>Add the following to the end of C.3.7:</i></b> Tenderers will be disqualified:  a) If any of the directors/shareholders of the Tenderer are listed on the National Treasury Register of Tender Defaulters in terms of the Prevention and Combating of Corrupt Activities Act of 2004 as a person prohibited from doing business in the public sector.
C.3.8	<b><i>Add the following after C.3.8.1</i></b>

Clause number	Data
Test for Responsiveness	<p>Bid evaluation process will be based on below steps and qualified tenderers may be subject to negotiations of the most acceptable rate as outlined in the Standard for Uniformity in Engineering and Construction Works Contracts as contained in the Government Gazette No 42622 of August 2019.</p> <p><b>STEP 1: DETERMINE COMPLETENESS OF TENDER SUBMISSIONS</b></p> <ul style="list-style-type: none"> <li>i) Tender submissions will be screened to identify schedules and requested documents that are incomplete or have not been submitted.</li> <li>ii) Tender submission will be tested for compliance with all the requirements of the as-amended Standard Conditions of Tender including the following: <ul style="list-style-type: none"> <li>• Eligibility.</li> <li>• Alterations to the bid documents.</li> <li>• SBD4 Bidder Disclosure – must be filled and signed.</li> </ul> </li> <li>iii) Tender offers will be declared non-responsive should they fail to comply with any one of the requirements of the above.</li> <li>iv) Non-responsive Tender Submissions will not be further evaluated.</li> </ul> <p><b>STEP 2: PRE-QUALIFICATION &amp; COMPLIANCE REQUIREMENTS</b></p> <ul style="list-style-type: none"> <li>1. Tender submissions will be assessed to determine whether the documents submitted provide sufficient evidence to demonstrate minimum compliance with the capability requirements set out in the Tender Data.</li> <li>2. The minimum compliance requirements cover two areas: <ul style="list-style-type: none"> <li>a. Tenderer’s expertise and experience; and</li> <li>b. Key Staff qualifications and experience.</li> <li>c. Company quality management.</li> </ul> </li> <li>3. Failure to meet any one of the minimum capability requirements will result in the Tender Submission being declared non-responsive.</li> <li>4. Non-responsive Tender Submissions will not be further evaluated.</li> </ul> <p>Evaluation on 80/20 or 90/10 preferential system (Preferential Procurement Regulations PPR 2022) will only be done during the RFQ/RFP process.</p>
C.3.8.3	<p><b>Add the following after C.3.8.2:</b></p> <ul style="list-style-type: none"> <li>a) The Tender Submission does not meet the minimum Capability requirements stated in the Tender Data.</li> <li>b) If requested by the Employer during the tender evaluation process, the Tenderer has failed to clarify or submit any supporting documentation within the time for submission stated in the</li> </ul>

Clause number	Data
	Employer's written request.
C.3.11 Evaluation of Tender Offers	<p>The tenders will be evaluated in two stages as follows:</p> <ol style="list-style-type: none"> <li>1. Completeness of Tender Submission</li> <li>2. Achieving minimum capability requirements</li> </ol>
C.3.11.1	<p><b>General</b></p> <p>Tenders will be evaluated in terms of the Amatola Water procurement policy.</p> <p>The Employer reserves the right to contact references and make enquiries to determine the Tenderer's competence, reliability, experience, reputation, and capability to perform the works.</p>
C.3.17	The number of paper copies of the signed contract to be provided by the Employer is <b>one</b> .

# **PART T2: RETURNABLE DOCUMENTS**

**T2.1 Returnable Documents**

**T2.2 Returnable Schedules**

## T2.1 RETURNABLE DOCUMENTS

Failure to fully complete the compulsory returnable documents shall render such a tender offer non-responsive.

Tenderers shall note that their signatures appended to each returnable form represents a declaration that they vouch for the accuracy and correctness of the information provided, including the information provided by candidates proposed for key positions.

Notwithstanding any check or audit conducted by or on behalf of the Employer, the information provided in the returnable documents is accepted in good faith and as justification for entering a contract with a Tenderer. If subsequently any information is found to be incorrect, such discovery shall be taken as willful misrepresentation by that Tenderer to induce the contract. In such event, the Employer has the discretionary right under the contract conditions to terminate the contract.

The Tenderer must complete the following returnable Schedules:

<b>COMPULSORY TENDER DOCUMENTS FOR TENDER EVALUATION PURPOSES</b>	
	RECORD OF ADDENDA TO TENDER DOCUMENTS
	SBD 1: INVITATION TO TENDER
	AUTHORITY FOR SIGNATORY
	CERTIFICATE OF AUTHORITY FOR JOINT VENTURES
	COMPULSORY ENTERPRISE QUESTIONNAIRE
	SBD 4: BIDDERS DISCLOSURE
<b>OTHER DOCUMENTS REQUIRED FOR TENDER EVALUATION PURPOSES (TO BE ATTACHED WITH SUBMISSION)</b>	
	REGISTRATION ON NATIONAL TREASURY CENTRAL SUPPLIER DATABASE
	LETTER OF GOOD STANDING
	TAX CLEARANCE COMPLIANCE REQUIREMENTS
	SBD 6.1: PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PRERENTIAL PROCUREMENT REGULATIONS 2022.
<b>RETURNABLES FOR MINIMUM CAPABILITY REQUIREMENT AND COMPLIANCE VERIFICATION</b>	
	KEY PERSONNEL
	COMPANY EXPERIENCE: PREVIOUS RELATED PROJECTS
	PROOF OF QUALITY MANAGEMENT SYSTEM AND CERTIFICATION

## T2.2 RETURNABLE SCHEDULES

**PART A  
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF AMATOLA WATER-AMANZI					
BID NUMBER:	AW2023/24/04	CLOSING DATE:	02/04/2024	CLOSING TIME:	11:00am
DESCRIPTION	PANEL FOR PROFESSIONAL SERVICES PROVIDERS TO RENDER MULTI-DISCIPLINARY SERVICES FOR AMATOLA WATER COVERING: CIVIL, STRUCTURAL, MECHANICAL, ELECTRICAL ENGINEERING & ENGINEERING MANAGEMENT SERVICES FOR A PERIOD OF THREE (3) YEARS.				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
<b>Reception area of Amatola House</b>					
<b>6 Lancaster Road</b>					
<b>Vincent</b>					
<b>East London</b>					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms Namhla Ndlamla		CONTACT PERSON	Ms Bulelwa Leni	
TELEPHONE NUMBER	043 707 3700		TELEPHONE NUMBER	043 707 3700	
FACSIMILE NUMBER	n/a		FACSIMILE NUMBER	n/a	
E-MAIL ADDRESS	<a href="mailto:nndlamlamla@amatolawater.co.za">nndlamlamla@amatolawater.co.za</a>		E-MAIL ADDRESS	<a href="mailto:bleni@amatolawater.co.za">bleni@amatolawater.co.za</a>	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [[IF YES ENCLOSE PROOF]]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [[IF YES, ANSWER THE QUESTIONNAIRE BELOW]]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <span style="float:right"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>					
DOES THE ENTITY HAVE A BRANCH IN THE RSA? <span style="float:right"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>					
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <span style="float:right"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>					
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <span style="float:right"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>					
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <span style="float:right"><input type="checkbox"/> YES <input type="checkbox"/> NO</span>					
<b>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.</b>					

PART B

TERMS AND CONDITIONS FOR BIDDING

<b>1. BID SUBMISSION:</b>
1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED (NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
<b>2. TAX COMPLIANCE REQUIREMENTS</b>
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS <b>TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.</b>
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN <b>THE SERVICE OF THE STATE."</b>

**NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.**

SIGNATURE OF BIDDER: .....

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

DATE: .....



**RECORD OF ADDENDA TO TENDER DOCUMENTS**

We confirm that the following communications received from the Employer before the submission of this tender offer, amending the tender documents, have been taken into account in this tender offer:		
	<b>Date</b>	<b>Title or Details</b>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Attach additional pages if more space is required.

Signed

Date

Name

Position

Tenderer

**CERTIFICATE OF AUTHORITY TO SIGN**

I/We\*, the undersigned, am/are\* duly authorised to sign the form of tender on behalf of

.....  
by virtue of the Articles of Association/Resolution of the Board of Directors\*, of which a certified copy is attached, or

.....  
.....

\*Delete whichever is inapplicable

1.			
	<b>NAME</b>	<b>SIGNATURE</b>	<b>DATE</b>

2.			
	<b>NAME</b>	<b>SIGNATURE</b>	<b>DATE</b>

**WITNESSES:**

1.			
	<b>NAME</b>	<b>SIGNATURE</b>	<b>DATE</b>

2.			
	<b>NAME</b>	<b>SIGNATURE</b>	<b>DATE</b>

## CERTIFICATE OF AUTHORITY FOR JOINT VENTURES

This Returnable Schedule is to be completed only if Tenderer is a joint venture.

We, the undersigned, are submitting this tender offer in joint venture and hereby authorise,

Mr/Ms ..... , authorised signatory of the company, close corporation or partnership .....acting in the capacity of lead partner, to sign all documents in connection with the tender offer and any contract resulting from it on our behalf.

NAME OF FIRM	ADDRESS	DULY AUTHORISED SIGNATORY
Lead partner		Signature :  Name :  Designation
		Signature :  Name :  Designation
		Signature :  Name :  Designation .....
		Signature :  Name :  Designation

**Note:**

**A copy of the Joint Venture Agreement showing clearly the percentage contribution of each partner to the Joint Venture shall be appended to this Schedule.**

## COMPULSORY ENTERPRISE QUESTIONNAIRE

The following particulars must be furnished. In the case of a joint venture, **separate** enterprise questionnaires in respect of each partner must be completed and submitted.

**Section 1: Name of enterprise:** .....

**Section 2: VAT registration number, if any:** .....

**Section 3: CIDB registration number, if any:** .....

**Section 4: Particulars of sole proprietors and partners in partnerships**

Name*	Identity number*	Personal income tax number*

\* Complete only if sole proprietor or partnership and attach separate page if more than 3 partners

**Section 5: Particulars of companies and close corporations**

Company registration number .....

Close corporation number .....

Tax reference number .....

**Section 6: Record of service of the state**

Indicate by marking the relevant boxes with a cross, if any sole proprietor, partner in a partnership or director, manager, principal shareholder or stakeholder in a company or close corporation is currently or has been within the last 12 months in the service of any of the following:

- |  |   |
|--|---|
| <input type="checkbox"/> a member of any municipal council<br><input type="checkbox"/> a member of any provincial legislature<br><input type="checkbox"/> a member of the National Assembly or the National Council of Province<br><input type="checkbox"/> a member of the board of directors of any municipal entity<br><input type="checkbox"/> an official of any municipality or municipal entity | <input type="checkbox"/> an employee of any provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act 1 of 1999)<br><input type="checkbox"/> a member of an accounting authority of any national or provincial public entity<br><input type="checkbox"/> an employee of Parliament or a provincial legislature |
|--|---|

If any of the above boxes are marked, disclose the following: (insert separate page if necessary)

Name of sole proprietor, partner, director, manager, principal shareholder or stakeholder	Name of institution, public office, board or organ of state and position held	Status of service (tick appropriate column)	
		current	Within last 12 months

\* Insert separate page if necessary

**Section 7: Record of spouses, children and parents in the service of the state**

Indicate by marking the relevant boxes with a cross, if any spouse, child or parent of a sole proprietor, partner in a partnership or director, manager, principal shareholder or stakeholder in a company or close corporation is currently or has been within the last 12 months been in the service of any of the following:

- a member of any municipal council
- a member of any provincial legislature
- a member of the National Assembly or the National Council of Province
- a member of the board of directors of any municipal entity
- an official of any municipality or municipal entity
- an employee of any provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act 1 of 1999)
- a member of an accounting authority of any national or provincial public entity
- an employee of Parliament or a provincial legislature

Name of spouse, child or parent	Name of institution, public office, board or organ of state and position held	Status of service (tick appropriate column)	
		current	Within last 12 months

\* Insert separate page if necessary

The undersigned, who warrants that he/she is duly authorised to do so on behalf of the enterprise:

- i) authorizes the Employer to obtain a tax clearance certificate from the South African Revenue Services that my / our tax matters are in order;
- ii) confirms that the neither the name of the enterprise or the name of any partner, manager, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears on the Register of Tender Defaulters established in terms of the Prevention and Combating of Corrupt Activities Act of 2004;
- iii) confirms that no partner, member, director or other person, who wholly or partly exercises, or may exercise, control over the enterprise appears, has within the last five years been convicted of fraud or corruption;
- iv) confirms that I / we are not associated, linked or involved with any other tendering entities submitting tender offers and have no other relationship with any of the tenderers or those responsible for compiling the scope of work that could cause or be interpreted as a conflict of interest;
- v) confirms that the contents of this questionnaire are within my personal knowledge and are to the best of my belief both true and correct.

**SIGNED BY/ON BEHALF OF TENDERER:**

Signed ..... Date.....

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

**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:

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

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

.....

2.3 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:

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

**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.

<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.

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.

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 ENHANCING COMPLIANCE, TRANSPARENCY AND ACCOUNTABILITY IN SUPPLY CHAIN MANAGEMENT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature Date

.....  
Position Name of Bidder



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

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

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

**1. GENERAL CONDITIONS**

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

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

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

*(delete whichever is not applicable for this tender).*

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

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

**1.4 To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	

<b>SPECIFIC GOALS</b>	
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

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

## **2. DEFINITIONS**

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

## **3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES**

### **3.1. POINTS AWARDED FOR PRICE**

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

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

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

Where

$P_s$  = Points scored for price of tender under consideration

Pt = Price of tender under consideration  
Pmin = Price of lowest acceptable tender

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

#### 3.2.1. POINTS AWARDED FOR PRICE

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

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

Where

Ps = Points scored for price of tender under consideration  
Pt = Price of tender under consideration  
Pmax = Price of highest acceptable tender

### 4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
HDI (51% or more black ownership)	4	2		
Black women (51% or more women ownership)	4	2		
Black youth (51% or more youth ownership)	4	2		
People with disability (20% or more disabled people ownership)	2	2		
Locality (Enterprise within the Eastern Cape)	6	2		

**DECLARATION WITH REGARD TO COMPANY/FIRM**

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

4.4. Company registration number: .....

4.5. TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

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

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not

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

**NATIONAL TREASURY: CENTRAL SUPPLIER DATABASE**

Proof of registration on the National Treasury Central Supplier Database to be attached here (alternatively; the Tenderer to provide MAAA number).

## **LETTER OF GOOD STANDING**

Provide a Certified copy of Letter Proof of Good Standing with a compensation insurer who is approved by the Department of Labour in terms of Section 80 of the Compensation for Occupational Injuries and Diseases Act (Act No 130 of 1993) (COID).

## **TAX CLEARANCE COMPLIANCE REQUIREMENTS**

The Tenderer is required to submit the following with his tender:

### **Tax compliance PIN numbers in case of Bidder only / Consortia / JV:**

- (a) Bidders must ensure compliance with their tax obligations.
- (b) Bidders are required to submit their unique personal identification number (PIN) issued by SARS to enable the organ of state to view the taxpayer's profile and tax status.
- (c) Application for tax compliance status (TCS) or pin may also be made via e-filing. In order to use this provision, taxpayers will need to register with SARS as e-filers through the website [www.sars.gov.za](http://www.sars.gov.za).
- (d) Bidders may also submit a printed TCS together with the bid.
- (e) In bids where Consortia / Joint Ventures / Sub-Contractors are involved; each party must submit a separate proof of TCS / PIN / CSD number.
- (f) Where no TCS is available, but the Bidder is registered on the central supplier database (CSD), a CSD number must be provided.



**KEY PERSONNEL**

Appropriately qualified, skilled, and experienced professionally accredited key personnel assigned to designated key roles as stated in the compliance criteria for this bid. Bidders are advised that considerable attention will be applied during the evaluation process with regards to the quality of the key personnel proposed on the project. Therefore, during project implementation, it is imperative that only equal or better resources are used in the event of replacement.

<b>REQUIRED KEY PERSONNEL</b>	<b>NAME, RELEVANT PROFESSIONAL REGISTRATION</b>
<b>Project Director</b>	Name:
	Professional Registration and Registration No:
<b>Project Manager</b>	Name:
	Professional Registration and Registration No:
<b>Design Engineer: Civil</b>	Name:
	Professional Registration and Registration No:
<b>Design Engineer: Structural</b>	Name:
	Professional Registration and Registration No:
<b>Design Engineer: Mechanical</b>	Name:
	Professional Registration and Registration No:
<b>Design Engineer: Electrical</b>	Name:
	Professional Registration and Registration No:

Notes: The Bidder needs to have personnel as listed above in his/her employ either as permanent employees or contracted employees with valid contracts signed by both parties. This section shall be used for scoring points on key staff registrations with the relevant professional bodies and be required to be evaluated as responsive under these criteria. Certified academic qualifications certificates and 3- page CV showing relevant experience only for each personnel required must be provided.

Bidders should only submit the minimum required personnel as per the table above. It is not necessary to show the full staff complement of the Bidder. Bidders who fail to complete the tables above will be disadvantaged.

**COMPANY EXPERIENCE: PREVIOUS RELATED PROJECTS**

Company Experience in the implementation of Water Infrastructure projects by the Bidder. Only a maximum of four (4) relevant projects may be indicated in the table above, complete with the relevant project appointment letters and reference letters indicating the names of the client, name of project and project value to be evaluated as responsive with respect to these criteria. Only a maximum of four (4) relevant projects may be presented. Bidders who fail to complete the tables above will be disadvantaged.

<b>CRITERIA</b>	<b>LIST OF RELEVANT COMPLETED PROJECTS</b>
<b>Project 1</b>	<b>Name of Client:</b>  <b>Contact Details of Client:</b>  <b>Name of Project:</b>  <b>Project Value:</b>  <b>Scope of Works:</b>
<b>Project 2</b>	<b>Name of Client:</b>  <b>Contact Details of Client:</b>  <b>Name of Project:</b>  <b>Project Value:</b>  <b>Scope of Works:</b>
<b>Project 3</b>	<b>Name of Client:</b>  <b>Contact Details of Client:</b>  <b>Name of Project:</b>  <b>Project Value:</b>

	<b>Scope of Works:</b>
<b>Project 4</b>	<b>Name of Client:</b>  <b>Contact Details of Client:</b>  <b>Name of Project:</b>  <b>Project Value:</b>  <b>Scope of Works:</b>
<b>Project 5</b>	<b>Name of Client:</b>  <b>Contact Details of Client:</b>  <b>Name of Project:</b>  <b>Project Value:</b>  <b>Scope of Works:</b>

Notes: The Bidder shall attach to this page certified copies of the appointment letter / letter of award, the Certificate of Completion for the projects and the Client Reference letters as per the template provided based on the Category the Bidder has selected. The number of projects submitted shall match the number of projects for the category selected. It is the responsibility of the Bidder to submit valid and clear evidence to substantiate the project appointment and proof of completion. Failure to submit valid and clear evidence will result in the Bidder being deemed as non-responsive.

Signed

Date

Name

Position

Tenderer

**EVALUATION SCHEDULE: EXPERIENCE ON PREVIOUS RELATED PROJECTS**

The Tenderer shall provide details of his/her performance on each of the previous projects listed in the “Relevant Experience” returnable schedule. “Client Reference Scorecards” must be completed by each of the respective Clients for the projects listed in the “Relevant Experience” returnable schedule.

The following are to be completed by the Client and is to be supported in each case accompanied by Signed Appointment Letter; (ii) Signed and Stamped Reference (in the form issued to the tenderer).

**PROJECT NAME:** \_\_\_\_\_  
**NAME OF CLIENT:** \_\_\_\_\_  
**PROJECT CONSTRUCTION VALUE:** \_\_\_\_\_  
**PROJECT FEES CLAIMED AND PAID:** \_\_\_\_\_  
**FULL DESCRIPTION OF THE SCOPE OF WORKS:** \_\_\_\_\_  
**DUTIES OF THE PROFESSIONAL SERVICE PROVIDER:** \_\_\_\_\_

**RATE SERVICE PROVIDER ON THEIR OVERALL PERFORMANCE:**

CRITERIA TO BE EVALUATED	RATING	ADDITIONAL COMMENTS
Quality of Planning and Site Investigations carried out under PSPs supervision		
Quality of Design Work		
Quality of Contract Administration carried out		
Quality of Site Supervision		
Overall quality of deliverables produced by the PSP		
Overall quality of project and engineering management provided by the PSP		
Ease of working with the PSP and team		

**Ratings:** Very Good 5, Good 4, Fair 3, Poor 2, Not Acceptable 1

Would the Client recommend the service provider to any other Client for appointment to carry out work of a similar nature to that the service provider carried out for you? Please explain?

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Signed

Date

Name

Position

**Client Stamp**

**PROOF OF QUALITY MANAGEMENT SYSTEM AND CERTIFICATION**

Signed

Date

Name

Position

Tenderer

## **PRICING SCHEDULE**

**NOT APPLICABLE AT THIS STAGE**

## **PART C1: AGREEMENTS AND CONTRACT DATA**



## C1.2 Contract Data

The Standard Professional Services Contract, July 2009, Third Edition of CIDB document 1014, published by the Construction Industry Development Board, is applicable to this Contract and is obtained from [www.cidb.co.za](http://www.cidb.co.za).

The following contract data is applicable to this contract:

CLAUSE.	DATA
	<b>Part 1: Data provided by the Employer</b>
3.4 and 4.3.2	The Employer is Amatola Water Board.
3.4 and 4.3.2	The authorized and designated representative of the Employer is: Bulelwa Leni The address for receipt of communications is:  6 Lancaster Place Vincent Park East London Telephone is: 043 707 3730 Email address is: BLeni@amatolawater.co.za
1	The project is:  Panel for Professional Services providers to render multi-disciplinary services for amatola water covering: civil, structural, mechanical, electrical engineering & engineering management services for a period of three (3) years.
1	The Period of Performance (i.e. work allocation) is only for three (3) years, from date Contract is in effect.
1	The Start Date is the date when the Service Provider receives his formal copy of the signed Contract and the Purchase Order from the Employer.
3.5	The location for the performance of the Project is within the area of jurisdiction of the Employer, and locations of the specific allocated/issued project(s) shall be as per the issued Work Order.
3.6	The Service Provider may not release public or media statements or publish material related to the Services or Project under any circumstances.
3.15.1	The programme shall be submitted within fourteen (14) days of the award of the Contract and issuing of the Purchase Order related to the work allocated.
3.15.2	The Service Provider shall update the programme at intervals not exceeding four (4) weeks.
3.16	The time-based fees shall not be adjusted for inflation.
3.16.1	The indices are those contained in Table A of P0141 Consumer Price Index for the CPI for all services published by Statistics South Africa
5.4.1	The Service Provider is required to provide professional indemnity cover as set out in the Professional Indemnity Schedule.

	<p>The Service Provider is required to provide the following insurances:</p> <p><b>1. Professional Indemnity</b>  Cover is: Three times the value of fees payable per work allocation.  Period of cover: Duration of Project including defects liability period</p> <p><b>2. Public Liability Insurance</b>  Cover is: R10 million per claim.  Period of cover: Duration of Project including defects liability period</p>
5.5	<p>The Service Provider is required to obtain the Employer's prior approval in writing before taking any of the following actions:</p> <p>Proceeding with each stage of the project  Allocation and Replacement of project team resources  Sub-Consulting/Contracting of Work  Appointment of Specialist Sub-Consultants and Sub-Contractors</p>
7.2	The Service Provider is required to provide personnel in accordance with the provisions of clause 7.2 and to complete the Personnel Schedule.
8.1	The Service Provider is to commence the performance of the Services within fourteen (14) days of date that the Contract becomes effective and receipt of a Purchase Order
8.2.1	The Contract is concluded when the scope of the work allocation is complete or when three years post work allocation or whichever comes first between the two.
8.4.1 (c)	If as a result of a budget adjustment process, it becomes necessary to change the funding allocation for the contract.
8.4.3 (c)	The period of suspension under clause 8.5 is not to exceed three months.
9.1	Copyright of documents prepared for the Project shall be vested with the Amatola Water.
11.1	A Service Provider may subcontract any work which he has the skill and competency to perform. Subcontracting of such work shall be done in accordance with Amatola Water's Supply Chain Management policy and relevant National Treasury prescripts. Subcontracting without prior return approval by Amatola Water may result in the contract being terminated.
12.1	Interim settlement of disputes is to be by mediation. In the event that the parties fail to agree on a mediator, the mediator is nominated by the President of the South African Institute of Civil Engineers.
12.2 and 12.3	Final settlement is by arbitration.
12.2.1	In the event that the parties fail to agree on a mediator, the mediator is nominated by South African Institute of Civil Engineers (SAICE) and or any relevant professional body in South Africa that is agreed to by both parties.
12.3.3	The adjudicator is the person appointed by the South African Institute of Southern Africa at the time the particular dispute to be referred arises.

12.4.1	In the event that the parties fail to agree on an arbitrator, the arbitrator is nominated by Amatola Water.																					
13.1.3	All persons in a joint venture or consortium shall carry a minimum professional indemnity insurance of not less than amounts stated in Clause 5.4.1.																					
13.4	Neither the Employer nor the Service Provider is liable for any loss or damage resulting from any occurrence unless a claim is formally made within 36 months from the date of termination or completion of the Contract.																					
13.5	The maximum amount of compensation payable by either Party to the other in respect of liability under the Contract is limited to three times the fees earned in the contract																					
13.6	The provisions of 13.6 do not apply to the Contract																					
14.1	The Employer has approved the Service Provider ceding payments directly to the sub-consultants via the standard cession agreement of the Employer, therewith undertaking to make payments directly to the sub-consultants in terms of the cession agreement.																					
14.2	Amounts due to the service provider shall be paid by the Employer within thirty (30) days of the Employer receiving payment by the relevant funding institution(s).																					
14.5	The deduction of retention monies will not be applicable to this contract.																					
15	The interest rate will be prime interest rate of the Employers bank at the time that the amount is due.																					
	<b>Part 2: Data provided by the Service Provider</b>																					
1/3.4/5.1.3/5.3	The Service Provider is:  The Service Provider's representative is: Address: Telephone: Facsimile:																					
5.5 7.1.2	The Key Persons and their jobs / functions in relation to the services are:																					
	<table border="1"> <thead> <tr> <th>ROLE</th> <th>NAME OF RESOURCE</th> <th>SPECIFIC DUTIES</th> </tr> </thead> <tbody> <tr> <td>Project Director</td> <td></td> <td></td> </tr> <tr> <td>Project Manager</td> <td></td> <td></td> </tr> <tr> <td>Design Engineer: Civil</td> <td></td> <td></td> </tr> <tr> <td>Design Engineer: Structural</td> <td></td> <td></td> </tr> <tr> <td>Design Engineer: Mechanical</td> <td></td> <td></td> </tr> <tr> <td>Design Engineer: Electrical</td> <td></td> <td></td> </tr> </tbody> </table>	ROLE	NAME OF RESOURCE	SPECIFIC DUTIES	Project Director			Project Manager			Design Engineer: Civil			Design Engineer: Structural			Design Engineer: Mechanical			Design Engineer: Electrical		
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## **PART C3: SCOPE OF WORKS**

### **C3.1 EMPLOYER'S OBJECTIVE**

The Employer's objective is to create project management, project implementation readiness, design, construction supervision capacity by appointing Professional Services Providers for the planning and implementation of various water and sanitation related projects in Amatola Water area of jurisdiction on an as and when required basis for a period of three (3) years.

### **C3.2 LEGISLATION, GUIDELINES, NORMS, AND STANDARDS**

The project implementation legislation, guidelines, norms, and standards to be utilised by the panel to executive projects are as follows:

- National Treasury legislation including the Public Finance Management Act.
- Framework for Infrastructure Procurement and Delivery Management (FIPDM).
- Guideline for Services and Processes for Estimating Fees for Persons Registered in terms of the Engineering Profession Act, 2000 (Act 46 of 2000).
- Department of Water and Sanitation Planning Guidelines.
- National Norms and standards for Domestic Water and Sanitation Services.
- Division of Revenue Act, which is enacted annually and associated grant conditions for projects implemented using conditional grants.
  - Department of Corporate Governance and Traditional Affairs Municipal Infrastructure Grant.
  - Regional Bulk Infrastructure Grant Project (RBIG) Planning Guideline.
  - Department of Education Schools Grant.
- National Environmental Management Act (107 of 1998).
- Occupational Safety and Health Act (85 of 1993).
- SANS 241 – Standards for Potable Water in South Africa.
- Any other legislation, guideline, norms, and standards that may be enacted during the period of this bid.

### **C3.3 DESCRIPTION OF SERVICES REQUIRED**

The following services will be required to be undertaken under the panel and split as follows:

- Planning, Studies, Investigations and Assessments
- Normal Services
- Additional Services
- Specialist Services

#### **The Planning, Studies, Investigations and Assessments can be summarised as follows:**

The provision of all services described in Clause 3.1 of Board Notice 138 of 2015: Guideline for Services and Processes for Estimating Fees for Persons Registered in terms of the Engineering Profession Act, 2000 (Act 46 of 2000), as amended or amplified upon in the Request for Quotation documentation to be issued to successful Bidders.

Depending on the funding source, work to be carried out in terms of planning may be carried out in accordance with the Department of Water and Sanitation requirements (RBIG) or in line with the requirements of private institutions that may be funding the project. It is further noted that AW may also call on the panel to submit proposals for studies that require specialist services that are not necessarily linked to a design and construction project, however required for the operations and compliance of the institutions to the relevant statutory obligations.

**The Normal Services can be summarised as follows:**

<b>STAGE 1: Inception Services</b>	
<b>Typical Activities</b>	<b>Typical Deliverables</b>
<p>Assist in developing a clear project brief.  Attend project initiation meetings.  Advise on procurement policy for the project.  Advise on the rights, constraints, consents, and approval.  Define the scope of services and scope of work required.  Conclude the terms of the agreement with the client.  Advise on the necessary surveys, analyses, tests and site or other investigations where such information will be required for Stage 2 including the availability and location of infrastructure and services.  Determine the extent of information, data, drawings, and plans relating to the project available at commencement.  Provide necessary information within the agreed scope of the project to other PSPs and professionals involved.</p>	<p>Project brief  Agreed scope of work  Agreed services.  Project procurement policy  Signed agreements.  Integrated schedule of consents and approvals  Project initiation programme  Record of all meetings  Client approval to proceed to Stage 2</p>
<b>STAGE 2: Concept and Viability Services</b>	
<b>Typical Activities</b>	<b>Typical Deliverables</b>
<p>Assist the client in the procurement of the other PSP.  Advise the client on the requirements to appoint health and safety PSP.  Communicate the project brief to the other PSPs and monitor the development of the concept and viability.  Agree the format and procedures for cost control and reporting by the other PSPs.  Prepare a documentation and indicative construction programme.  Co-ordinate the concept and viability documentation for presentation to the client for approval.  Facilitate the approval of the concept and viability by the client.  Facilitate the approval of the concept and viability by statutory authorities.</p>	<p>Signed Client Agreements  Client approval to proceed to Stage 3.</p>
<b>STAGE 3: Design Development Services</b>	
<b>Typical Activities</b>	<b>Typical Deliverables</b>
<p>Agree and implement communication processes and procedures for the design development of the project.  Assist the client in the procurement of the necessary other PSPs including the clear definition of their roles and responsibilities.  Prepare, co-ordinate, agree and monitor a detailed design and documentation programme.  Conduct and record PSPs' and management meetings.  Facilitate inputs required by the health and safety consultant. Facilitate design reviews for compliance and cost control.  Facilitate timeous technical co-ordination.  Facilitate client approval of all Stage 3 documentation.</p>	<p>Additional signed client/PSP agreements  Detailed design and documentation programme  Record of all meetings  Approval by client to proceed to Stage 4</p>
<b>STAGE 4: Documentation and Construction Procurement Services</b>	

<b>Typical Activities</b>	<b>Typical Deliverables</b>
<p>Recommend and agree the procurement strategy for Contractors, subContractors and suppliers with the client and other PSP.</p> <p>Prepare and agree the project procurement programme.</p> <p>Advise the client, in conjunction with the other consultants on the appropriate insurances.</p> <p>Co-ordinate and monitor the preparation of the procurement documentation by the PSPSs in accordance with the project procurement programme.</p> <p>Manage the procurement process and recommended Contractors for approval by the client.</p> <p>Agree the format and procedures for monitoring and control by the cost PSPs of the cost of the works.</p> <p>Co-ordinate and assemble contract documentation for signature.</p>	<p>The procurement strategy</p> <p>Procurement programme</p> <p>Tender/contract conditions</p> <p>Record of all meetings</p> <p>Obtain approval by client of tender recommendation(s)</p> <p>Contract documentation ready for signature</p>
<b>STAGE 5: Contract Administration and Inspection Services</b>	
<b>Typical Activities</b>	<b>Typical Deliverables</b>
<p>Arrange the site handover to the Contractor.</p> <p>Establish the construction documentation issue process.</p> <p>Agree and monitor the issue and distribution of construction documentation.</p> <p>Instruct the Contractor on behalf of the client to appoint subContractors.</p> <p>Conduct and record regular site meetings.</p> <p>Monitor, review and approve the preparation of the construction programme by the Contractor.</p> <p>Regularly monitor the performance of the Contractor against the construction programme.</p> <p>Adjudicate entitlements that arise from changes required to the construction programme.</p> <p>Receive, co-ordinate and monitor approval of all contract documentation provided by the Contractor(s).</p> <p>Agree the quality assurance procedures and monitor the implementation thereof by the other PSPs and Contractors.</p> <p>Monitor the preparation and auditing of the Contractor's health and safety plan and approval thereof by the health and safety consultant.</p> <p>Monitor the preparation of the environmental management. plan by the environment consultant.</p> <p>Establish procedures for monitoring scope and cost variations.</p> <p>Monitor, review, approve and issue certificates.</p> <p>Receive, review, and adjudicate any contractual claims.</p> <p>Monitor the preparation of financial control reports by other PSPs.</p> <p>Prepare and submit progress reports.</p> <p>Facilitate and expedite occupation certificates.</p> <p>Coordinate, monitor and issue the practical completion lists and the certificate of practical completion.</p>	<p>Signed contracts.</p> <p>Approved construction programme</p> <p>Approved contractual claims.</p> <p>Construction documentation schedule</p> <p>Payment certificates</p> <p>Progress reports</p> <p>Record of meetings</p> <p>Certificate(s) of practical completion</p>
<b>STAGE 6: Close out Services</b>	
<b>Typical Activities</b>	<b>Typical Deliverables</b>
<p>Co-ordinate and monitor the rectification of defects.</p> <p>Manage the conclusion and procurement of operations and maintenance contracts, manuals, guarantees and warranties.</p> <p>Manage the preparation as-built drawings, documentation, training of staff.</p> <p>Manage the procurement of outstanding statutory certificates.</p> <p>Monitor, review and issue payment certificates.</p>	<p>Completion certificates</p> <p>Record of necessary meetings</p> <p>Infrastructure bar coded and captured on AW Asset Register</p>

<p>Issue the completion certificates.          Manage the agreement of the final accounts.          Prepare and present the project closeout report.          Unbundling of assets from the project scope</p>	<p>Infrastructure captured on AW's planned maintenance and GIS system.          Trained AW staff to maintain new infrastructure.          Project closeout report          Unbundling of assets and assets register book register.</p>
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The provision of all project management services to be in accordance with Clause 3.0 (Standard Services) and Clause 4.0 (Additional/Supplementary services) of Board Notice 202 of 2011: Guideline Scope of Services and Recommended Guideline Tariff of Fees for Persons Registered in terms of the Project and Construction Management Professions, (Act 48 of 2000), as amended or amplified in the Request for Quotation documentation to be issued to successful Bidders.

**The Additional Services can be summarised as follows:**

The provision of additional services pertaining to all services described in Clause 3.3.1 of Board Notice 138 of 2015: Guideline for Services and Processes for Estimating Fees for Persons Registered in terms of the Engineering Profession Act, 2000 (Act 46 of 2000), as amended or amplified upon in the Request for Quotation documentation to be issued to successful Bidders.

The provision of construction monitoring described in Clause 3.3.2 of Board Notice 138 of 2015: Guideline for Services and Processes for Estimating Fees for Persons Registered in terms of the Engineering Profession Act, 2000 (Act 46 of 2000), as amended or amplified upon in the Request for Quotation documentation to be issued to successful Bidders.

The provision of all health and safety related services to be in accordance with Clause 3.0 (Standard Services) and Clause 4.0 (Additional/Supplementary services) as described in the Guideline Scope of Services and Recommended Guideline Tariff of Fees for Persons Registered in terms of the Project and Construction Management Professions, 2000 (Act 48 of 2000), as amended or amplified in the Request for Quotation documentation to be issued to successful Bidders.

It will be a contractual obligation for all RFQ's to be issued under this panel that 30% of the works needs to be sub-contracted to QSE and EMEs in accordance with the Supply Chain Management policy of AW. Where that is required, the service provider will be required to develop training and management plans for the appointed EMEs and QSEs for the consultancy work and further develop, manage, and supervise the work associated with the subcontracting of the works to EMEs and QSEs during the construction.

Procurement of all service providers required to carry out additional services must be approved by Amatola Water before they can be procured.

**The Specialist Services can be summarised as follows:**

Where the Employer requires specialist services from the successful Bidders to comply to the Scope of



Works as described in the RQs, such services shall be provided by the service provider and shall be concluded on a Time and Cost basis.

### **C3.4 FORMAT OF COMMUNICATION**

All requests for formal approval from the Employer or any other body shall be submitted in writing in hard copy format. Interim payment claims shall be submitted in the same format, accompanied by an original tax invoice and project progress reports as proof of work done to substantiate claim. Ad-hoc communication between the Employer and the successful Bidder may be conducted via electronic format (email). Electronic copies shall also be submitted for the record. WhatsApp, text messaging and other forms of social media communication tools are not a valid and approved communication channel for this panel and any approvals that may be required or issued via these channels are not valid unless confirmed in writing via email or hard copy.

### **C3.5 INTELLECTUAL PROPERTY RIGHTS AND CONFIDENTIALITY**

Any intellectual property (including but not limited to source documents, designs, maps, drawings, reports, statistics, recordings, photography, computer software, electronic documents, etc.) that may result from the project will be the sole property of AW. In alignment with the above, any information arising from or within a project will be treated as confidential and no information is to be divulged, provided to or mentioned to persons or parties not involved in the project except where permission is granted in writing for the specific purpose.

## **PART C4: SITE INFORMATION**

#### **C4.1 LOCATION OF THE WORKS**

Amatola Water's current area of operation in terms of Section 29 business activities covers a tract of the central Eastern Cape Province, encompassing most of the Amathole and Chris Hani District Municipalities together with lesser portions of the Joe Gqabi and Sarah Baartman Districts.

In terms of Section 30 business activities, AW covers the entire Eastern Cape with projects extending as far as OR Tambo District, Alfred Nzo District and Nelson Mandela Bay district.

Successful Bidders can expect to work in all districts, towns, townships, and rural areas of the Eastern Cape where AW provides Section 29 and 30 services. Access to these areas ranges from open tarred roads to undulating terrain using gravel roads.