



Public Procurement and Disposal of Public Assets Authority



PREPARATION OF BIDDING DOCUMENTS AND KEY APPROVAL REQUIREMENTS BY CC

TRAINING FOR STAFF OF KAMULI DISTRICT LOCAL GOVERNMENT

Venue: Malamu centre, Kamuli District

Presentation by: Ronald Tumuhairwe | Manager Capacity Building
| rtumuhairwe@ppda.go.ug

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PPdA Training Objectives



- 😊 Background
- 😊 Highlight the types of SBDs
- 😊 Stakeholders in the preparation of bid documents
- 😊 To explain the Key Issues to consider when approving bidding documents





- ❖ SBDs are prepared by a number of organizations such as FIDIC, World Bank, ADB and the PPDA
- ❖ Depending on source of funding, a PDE may be required to use a certain SBD
- ❖ In Uganda, the Law requires that any PDE using GoU Funds, should use SBDs as issued by the PPDA
- ❖ PPDA SBDs are readily available at:
www.ppda.go.ug



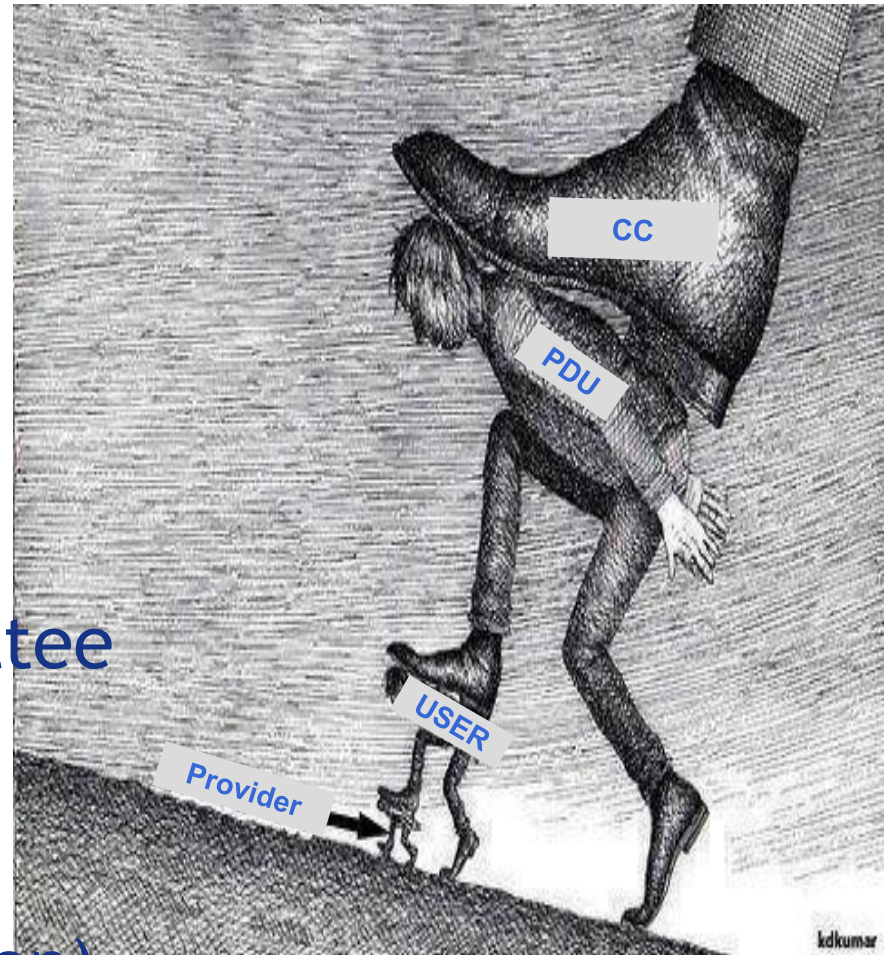
The SBDs are designed for different requirements, and they include:

- ♠ SBD for Works
- ♣ SBD for Supplies
- ♥ SBD for services-Consultancy and Non Consultancy services
- ♦ SBD for disposal
- ♠ SBD for Pre-qualification
- ♣ SBD for Framework Contracts





- ♠ The user department
 - (writing SoRs)
- ♠ The PDU
 - (evaluation criteria,
 - bid data sheet,
 - contract forms)
- ♠ The contracts committee
 - (approval)
- ♠ The providers
 - (preparation & submission)





- ✓ They provide uniform information to all bidders
- ✓ They elaborate the procedures and regulations of bidding
- ✓ They are worded as to promote and encourage competition
- ✓ They simplify the preparation of bidding document by PDEs
- ✓ Facilitate and simplify the PDEs evaluation of the bidders



- ✓ Minimise the time required by CC in approving the Documents
- ✓ Reduce the bidders preparation time and effort
- ✓ Form the basis for a potential contract between the PDE & the provider



Part 1 Bidding Procedures

Instructions to Bidders (ITB)

Bid submission sheet

Evaluation Methodology and Criteria

Bidding Forms

Eligible Countries

Part 2 Statement of Requirements

Statement of Requirements

Part 3 Contract

General Conditions of Contract (GCC)

Special Conditions of Contract (SCC)

Contract Forms



- The SBDs have been designed to require the minimum of input or changes to the document so that a final BD can be produced with minimum time and effort
- Most importantly the provisions in
- **Section 1** “Instructions to Bidders” and
- **Section 7** “General Conditions of Contract”
- must be used with their text unchanged



- Any data or information that Sections 1 or 7 require are to be included respectively in;
 - Section 2 “Bid Data Sheet” and
 - Section 8 “Special Conditions of Contract.”
- Data and information contained in the remaining Sections should be modified as follows



- The Instructions to Bidders (ITB) inform Bidders of the procedures that regulate the bidding process
- The ITB clearly identifies the provisions that may normally need to be specified for a particular bidding process and require that such details be introduced through the BDs.



The Bid Data Sheet (BDS) supplements the ITB by specifying details relevant to an individual bidding document. This part is to be filled by the PDU and includes:

- ✓ Name of PDE
- ✓ Subject of procurement
- ✓ Procurement Reference No.
- ✓ No. of lots a bidder may bid
- ✓ Contact address and persons
- ✓ Medium of communication



- ✓ Language of the bid
- ✓ Any other documents submitted with the bid
- ✓ Applicable Incoterms
- ✓ Scope of prices quoted (state if adjustable & Formula)
- ✓ Currency
- ✓ Bid validity period
- ✓ Bid security requirements- amount and form
- ✓ No. of copies to be submitted with original



- ✓ Address and room of bid submission, deadline - date and time
- ✓ Bid opening- address, room and time



- ✓ The purpose of the Evaluation Methodology and Criteria (EMC) is to inform bidders of how the best evaluated bidder will be determined.
- ✓ This is to ensure that the evaluation is fair and treats all Bidders in the same manner.
- ✓ The document provides standard wording and text for the permitted methodologies



- ✓ It also should assist Bidders to prepare responsive bids which meet the PDE's needs and are competitive.
- ✓ The Procuring and Disposing Entity must prepare the EMC and include it as a part of the Bidding Documents.



- ✓ The Procuring and Disposing Entity shall include in the Bidding Document all bidding forms that the Bidder shall fill out and include in its bid. These forms include:
 - ✓ The Bid Submission Sheet,
 - ✓ The Price Schedules
 - ✓ Bid Security (where applicable)
 - ✓ Manufacturer's Authorisation

- ✓ The Procuring and Disposing Entity is not required to input or change any information in Section 4.



- ✓ The Statement of Requirements (SoRs) should provide sufficient information to enable bidders to efficiently and accurately prepare bids that are realistic and competitive and to ensure that bids meet the PDE's needs
- ✓ The SOR should be complete, precise, and clear. An incomplete, imprecise, or unclear SOR may prompt bidders to request clarifications from the PDE



Contents of SOR

List of supplies and related services- specifies the quantities of each of the Supplies and Related Services that the PDE requires the Bidder to include in its Bid

Delivery and completion schedule- to specify the delivery period and place for each of the Supplies and the completion period and site for each of the Related Services as listed

Specification and compliance sheet- defines the technical characteristics of the Supplies and Related Services required by the PDE

Drawings (where applicable)

Inspection and tests (where applicable)- specifies Inspections and Tests that the PDE requires the Supplies to be subject to



The General Conditions of Contract (GCC) contain standard provisions that have been designed to remain unchanged and **to be used without modifying their text.**

The GCC clearly identify the provisions that may normally need to be specified for a particular bidding process and require that such provisions be introduced through **the Special Conditions of Contract.**

The GCC are Contract documents and, therefore, **are a part of the Contract**



- ✓ The Special Conditions of Contract (SCC) supplement the GCC by modifying conditions applicable to an individual contract, such as payment terms or the period of warranty
- ✓ The SCC prevail over the GCC.



- ✓ These include the agreement form, performance security and advance payment security
- ✓ The purpose of including these forms in the BD is to notify the Bidders of the type and detail of the Contract they would receive in the event of an award.
- ✓ No input is required by the PDU when drafting the Bidding Document and there is no requirement for Bidders to submit these forms with their bids.



- Agreement- The completed Agreement will form part of any resulting Contract. However, the details to be completed on the Agreement are specific to the successful Bidder and therefore should be left blank for inclusion in the Bidding Document.
- After notification of award, the Procuring and Disposing Entity should prepare the Agreement using the Agreement Form and send it to the successful Bidder



Performance security and advance payment security- If a Performance Security is required, the form should be completed by the financial institution and returned to the PDE, by the Provider with the signed Agreement

Where advance payment is specified in the contract, the Advance Payment Security should be completed by the financial institution and submitted by the Provider to the PDE with an invoice.

The PDE is not required to input any information to the security forms.



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Thank You!

Head Office:

UEDCL Towers, Plot 37 Nakasero Road

P.O. Box 3925, Kampala Uganda

Tel: 256 414 311 100

Fax: 256 414 344 858 or 256 414 250 031

Web: www.ppda.go.ug

Email: info@ppda.go.ug

Connect: www.facebook.com/ppdauganda