

The United Republic of Tanzania



Ministry of Water

**Water Sector Development Programme
Implementation Manual
(PIM)**

Volume 4

FINAL

Procurement Manual

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TABLE OF CONTENTS

	ACRONYMS AND ABBREVIATIONS	iii
1.	INTRODUCTION	1
1.1	Policy Environment	1
1.2	Water Sector Development Programme	1
1.3	Programme Implementation Manual	2
2.	PURPOSE OF THE PROCUREMENT MANUAL	3
3.	WORLD BANK GUIDELINES, PUBLIC PROCUREMENT ACT AND STANDARD TENDER DOCUMENTS	3
4.	PROCUREMENT ORGANISATION AND RESPONSIBILITIES	4
4.1	The Tender Board	5
4.2	Procurement Management Unit	6
4.3	User Department	7
5.	CATEGORY AND METHODS OF PROCUREMENT	7
5.1	Category of Procurement	7
5.2	Methods of Procurement of Goods, Works and Non-Consultancy Services	8
5.3	Procurement of Consultant Services	11
6.	PROCUREMENT PLANNING.....	15
6.1	General	15
6.2	Stages in the Preparation of Procurement Plan	15
6.3	Contract Packaging	15
6.4	Procurement Scheduling and Time Requirements	16
6.5	Consolidation of Procurement Plans and Misprocurement	17
7.	PROCUREMENT MONITORING AND RECORD KEEPING.....	17
7.1	Keeping of the Records.....	18
7.2	Control of Procurement Documents – Shopping procedures.....	18
7.3	Stock Checking	19
7.4	Destruction of Unwanted Documents	19
7.5	Procurement Filing System	19
7.6	File Organization	19
7.7	Organization of Paper Work	19
7.8	Contract Register	20
	Annex 1: Procurement Checklist	22
	Annex 2: Formats of Progress Monitoring Reports	33
	Annex 3: Formats of Progress Monitoring Reports	36

ACRONYMS AND ABBREVIATIONS

BWOs	Basin Water Offices
CQ	Competitive Quotations
DC	Direct Contracting
DDCA	Drilling and Dam Construction Agency
EAs	Executive Agencies
GN	Government Notice
ICB	International Competitive Bidding
LCS	Least Cost Selection
LGAs	Local Government Authorities
MCS	MAJI Central Stores
MDGs	Millennium Development Goals
MoW	Ministry of Water
MRIN	Materials Requisition and Issue Note
NAWAPO	National Water Policy
NCB	National Competitive Bidding
NWSDS	National Water Sector Development Strategy
PE	Procuring Entity
PIM	Programme Implementation Manual
PMU	Procurement Management Unit
PPA	Public Procurement Act
PPRA	Public Procurement Regulatory Authority
PRS	Poverty Reduction Strategy
QBS	Quality Based Selection
QCBS	Quality and Cost- Based Selection
RDP	Rural Development Policy
RWSSP	Rural Water Supply and Sanitation Programme
SSP	Single Source Procurement
UWSSP	Urban Water Supply and Sewerage Programme
WRI	Water Resources Institute
WRMP	Water Resources Management Programme
WSDP	Water Sector Development Programme

1. INTRODUCTION

1.1 Policy Environment

The National Water Policy (NAWAPO) of 1991 was revised in 2002 introducing reform elements of devolution, poverty alleviation and civil service reform. It was strongly influenced by national policy instruments that address issues of poverty and economic development, and incorporate water sector reforms as one of several related components which, when combined, offer a multi-sector approach to poverty reduction and economic growth.

Key policy statements such as the National Development Vision 2025 set the stage for the Poverty Reduction Strategy (PRS) and the Rural Development Policy (RDP), which were then supported by the Local Government and Public Sector Reforms. The comprehensive review of the PRS led to the MKUKUTA (Mkakati wa Kukuza Uchumi na Kuondoa Umaskini) that sets operational goals and puts policy in a functional framework, which in the water sector is embodied in the National Water Sector Development Strategy (NWSDS) of 2006. The NWSDS sets out the strategy for NAWAPO implementation and in turn guides the formulation of the Water Sector Development Programme (WSDP).

1.2 Water Sector Development Programme

The Water Sector Development Programme (WSDP) is a consolidation of three sub-sector programmes. These are: the Water Resources Management Programme (WRMP); the Rural Water Supply and Sanitation Programme (RWSSP); and the Urban Water Supply and Sewerage Programme (UWSSP). Whereas the three sub-sector programmes form the main components of the WSDP, the programme also includes sector institutional strengthening and capacity building of MoW, RS, and other important institutions such as Drilling and Dam Construction Agency (DDCA), the Water Resources Institute (WRI), MAJI Central Stores (MCS), EWURA, NEMC, as well as the private sector, NGOs and CBOs to enable them effectively play their assigned roles in implementing the WSDP.

Tanzania's Development Vision 2025 aims at achieving an absence of abject poverty and attaining high quality of life for all people by 2025. Water supply, sanitation and water resources management feature prominently in the Development Vision 2025. Access to safe water in rural areas is targeted to rise from 53% (2003) to 90% and for urban population from 73% to 100% by 2025. In the medium term, MKUKUTA commits Tanzania to achieving the Millennium Development Goals (MDGs) for access to safe water, sanitation and a sustainable environment, while also setting targets for 2010. These include an increased proportion of the rural population with access to clean and safe water from 53% in 2003 to 65% by 2010. It also calls for increased access to clean and safe water to urban population from 73% in 2003 to 90% by 2010.

Intrinsic to these overall targets, are the objectives of equity of access, improved water management capacity, and improved sanitation facilities and their use. The programme also aims at use of environmentally sound technologies, and effective water tariffs; improved billing and revenue collection mechanisms. The objectives for the Water Sector Development Programme are reflected in the three components.

The objective of the Water Resources Management and Development component are to;

- (i) develop a sound water resources management and development framework in all nine water basins, for optimising utilisation of water resources in a sustainable manner for

various competing uses; (ii) promote good governance of water resources through empowering water users, encouraging participatory and transparent decision-making, devolving ownership to the user level, and granting secure water rights with responsibilities to the water users, community groups, local government and Basin Boards; and (iii) strengthen the capacity of basin offices to address trans-boundary and basin issues.

The overall objective of the Rural Water Supply and Sanitation Programme component is improved quality and quantity of drinking water and sanitation services for the rural population sustained through improved LGA level capacity, effective local water user entities, private sector participation and good health/hygiene/sanitation practices.

The overall objective of the Urban Water Supply and Sewerage Programme is improved and sustained quality and quantity of drinking water and sewerage services for urban populations managed by financially autonomous and commercially viable Urban Water and Sanitation utilities while providing efficient and cost-effective services.

These broad objectives of the WSDP are geared towards achieving the three outcomes of MKUKUTA — (i) economic growth and reduction of income poverty, (ii) improved quality of life and social well-being, and (iii) good governance and accountability. The water sector contribution to MKUKUTA objectives is aimed at these three clusters by: (a) scaling up water and sanitation services delivery to achieve Millennium Development Goals (MDGs), (b) establishment of a sustainable platform for water resources governance and development, and (c) strengthening of sector institutions and accelerated capacity building at the national, basin and local government levels as well as in the public and private sectors.

1.3 Programme Implementation Manual

The Programme Implementation Manual (PIM) has been developed as a framework within which the WSDP will be implemented. It is designed as a working tool – a reference document – to assist the Ministry of Water (MoW) and partner institutions including BWOs, (LGAs), Urban Water Supply and Sanitation Utilities (UWSSs), DDCA, and WRI in implementation of the WSDP. It is a quick guide on how the programme should be managed and implemented. The PIM provides key actors with information on the programme context, policies, institutional arrangements, stakeholders' responsibilities, implementation strategies, procurement procedures, and financial management arrangements.

In addition to PIM, each sub-sector prepared sub-sector specific Operational Guidelines to guide key technical and other aspects of component activities. This Manual, the Operational Guidelines and the PIM shall form part of the Development Contracts between the Ministry of Water and respective UWSAs, BWOs, and LGAs for implementation of the WSDP.

2. PURPOSE OF THE PROCUREMENT MANUAL

This Procurement Manual is intended to be a reference document to the Procurement Management Units (PMUs) of various implementing entities and should also be useful for the management, development partners, evaluators, and service providers, who will be involved in implementation of the Water Sector Development Programme.

The Procurement Manual has been prepared to complement other programme documents such as the PIM and the individual sub-sector Operational Manuals. It is not meant to replace the Public Procurement Act 2004, the Public Regulations 2005, and the World Bank Guidelines but rather it consolidates and summarizes the principles advocated by the Act, Regulations, and Guidelines. It is an attempt to identify specific choices of elements from the Act, Regulations and Guidelines that will be specifically applicable for the programme procurement. Whenever necessary, references shall be made to the original documents for further details.

The Procurement Manual contains detailed operating guidelines that are to be followed when executing procurement functions. The Manual provides guidance to procurement processes aiming to achieve consistency in procurement operations by all implementing agencies. The procurement procedures detailed in this manual should guide various procuring entities in all matters related to programme procurement activities including preparation, evaluation, award, contract management and record keeping. The manual covers procurement of works, goods and non-consultant services as well as selection and employment of consultants. The Manual articulates succinctly the uniform procedures and established controls for the procurement cycle to ensure that receipt of and payment for works, goods, and services carried out under the programme is done in a manner that satisfies all stakeholders.

3. WORLD BANK GUIDELINES, PUBLIC PROCUREMENT ACT AND STANDARD TENDER DOCUMENTS

In drafting this Procurement Manual, reference has been made to the Public Procurement Act, 2004.(No. 21 of 2004) of the United Republic of Tanzania supplemented by the Public Procurement (Goods, Works, Non-Consultant Services and Disposal of Public Asset by Tender) Regulations, 2005 as announced in the Government Notice No. 97 published on 15th April, 2005; and the Public Procurement (Selection and Employment of Consultants) Regulations, 2005 as announced in the GN. No. 98 Published on 15th April, 2005, on the one hand and the World Bank's "Guidelines: Procurement under IBRD Loans and IDA Credits" dated May 2004 Revised October 2006; and "Guidelines: Selection and Employment of Consultants by World Bank Borrowers" dated May 2004 Revised October 2006 on the other hand.

The Public Procurement Act 2004 repeals the Public Procurement Act, 2001. The Act decentralises procurement functions from the Central Tender Board to

Ministerial, Independent Department Agencies' Tender Boards and establishes a Public Procurement Regulatory Authority which has a role of setting standards, regulating, monitoring compliance and advising on public procurement matters.

Procurement under the WSDP will be carried out in accordance with the provisions stipulated in the financing agreements signed with Development Partners. World Bank's Guidelines shall be used for large contracts to be procured through ICB procedures. Procurement of non ICB contracts for goods, works; and selection of small consultant contracts will be carried out in accordance with the Public Procurement Act (2004), Public Procurement Regulations (2005), and associated Guidelines.

The Procurement Act, Regulations and Guidelines recommended to be followed by Implementing entities are intended to provide uniform procedures and established controls for the procurement cycle to ensure that receipt of any payment for civil works, goods, non-consultancy services and consultancy services carried out under the programme is done in a manner that satisfies the Financiers, the Government of Tanzania, Contractors and Consultants. The procedures and the rules will be available for reference to ensure that the procurement objective of acquiring the right quality of materials, item or service at the right time, in the right quantity from the right source, and at the right price, is achieved.

The Public Procurement Regulatory Authority has issued Standard Tender Documents, and Tender Evaluation Guidelines, in conformity with the Public Procurement Act 2004, for use in the United Republic of Tanzania. These Standard Tender Documents and Tender Evaluation Guidelines will be used for programme procurement processing except those under ICB procurement and large consulting services contract, which will use the World Bank's Bid Documents and Bid Evaluation Forms. The Government's Standard Tender Evaluation Guidelines are divided into two categories: (i) Tender Evaluation Guidelines for Procurement of Goods or Works, and (ii) Tender Evaluation Guidelines for Selection and Employment of Consultants. These guidelines provide details on the processes to be followed in carrying out evaluations under the various procurement methods.

The documents, which may be modified from time to time, are available at the PPRA website at www.ppra.go.tz and at the World Bank website (Standard Bidding Document) at www.worldbank.org.

4. PROCUREMENT ORGANISATION AND RESPONSIBILITIES

Procurement activities for goods, works, non-consultancy services and selection and employment of consultants under the WSDP shall be carried out by the following procuring entities. These procuring entities are:

- Ministry of Water (MoW),
- Urban Water Supply and Sewerage Authorities (Utilities),
- Basin Water Offices (BWOs)
- Local Government Authorities (LGAs)

Besides conducting normal procurement of items under their jurisdiction, the MoW will also be responsible for general oversight for procurements to be done by LGAs, Utilities, and BWOs. As one of the mitigation measures, the MoW will prior review the first two NCB contracts of each LGA, Utility, and BWO. The MoW will be as well be involved in capacity building at these levels. In addition, the MoW, through PMU, will be responsible for consolidation of annual procurement plans and procurement progress reports for further approval processes.

The composition, method of appointment of members, and the functions of the Tender Board of the above mentioned procuring entities is as described below:

4.1 The Tender Board

Composition of the Tender Board

Members of the Tender Boards shall be appointed for a period of three years. The composition of the tender board shall be as per the Public Procurement Act (2004), and consists of (i) a Chairman who shall be one of the heads of department or a person of similar standing and who shall be appointed by the Accounting Officer or Chief Executive, (ii) six (6) members who are heads of departments or persons of similar standing within the same procuring entity and who shall be appointed by the Accounting Officer or Chief Executive, and (iii) the Secretary who shall be a procurement specialist who shall be the head of the procurement management unit or department of the procuring entity and who shall be appointed by Accounting Officer or Chief Executive. A member of the Tender Board shall not be involved to adjudicate a tender of which it involves a firm or a company owned by his relatives or himself/herself. In that respect he/she shall not take part in the whole procurement process and shall disclose the interest related to that procurement.

Functions of Tender Boards

The function of the Tender board shall be as per the Public Procurement Act (2004). Specifically, a Tender Board shall be responsible for -

- a. Adjudication of recommendations from the Procurement Management Unit and award of contracts;
- b. Review all applications for variations, addenda or amendments to ongoing contracts;
- c. Approving tendering and contract documents;
- d. Approving procurement and disposal by tender procedures;
- e. Ensuring that best practices in relation to procurement and disposal by tender are strictly adhered by Procuring Entities;

- f. Ensure compliance with the Public Procurement Act of 2004; and
- g. Liaising directly with the Public Procurement Regulatory Authority" (PPRA) on matters within its jurisdiction.

The function of the Accounting Officer shall be as per the Public Procurement Act (2004). Specifically, the Accounting Officer, or Chief Executive, shall not be a member of the tender Board; but shall have the overall responsibility for the execution of the procurement process in the procuring entity, and in particular, shall be responsible for:

- (i) establishing a tender board in accordance with the Public Procurement Act (2004);
- (ii) appointing the members of the tender board specified in the second schedule of the Public Procurement Act (2004)
- (iii) Causing to be established a Procurement Management Unit staffed to an appropriate level;
- (iv) advertising tender opportunities;
- (v) appointing the evaluation committee;
- (vi) communicating award decisions;
- (vii) certifying the availability of funds to support the procurement activities;
- (viii) signing contracts for the procurement activities on behalf of the procuring entity;
- (ix) investigating complaints by suppliers, contractors or consultants;
- (x) submitting a copy of complaints and reports of the finding to the Public Procurement Regulatory Authority; and
- (xi) Ensuring that the implementation of the awarded contract is in accordance with the terms and conditions of the award.

4.2 Procurement Management Unit (PMU)

In every Procuring Entity there shall be established a Procurement Management Unit (PMU) staffed to an appropriate level. The PMU shall function as per the Public Procurement Act (2004). Specifically, it shall consist of procurement and other technical specialists together with the necessary supporting and administrative staff. The PMU shall be headed by a person with sufficient academic qualifications and experience in procurement functions.

Functions of PMU:

- i. manage all procurement and disposal by tender activities of the procuring entity except adjudication and the award of contract;
- ii. support the functioning of the Tender Board;
- iii. implement the decisions of the Tender Board;
- iv. liaise directly with the Public Procurement Regulatory Authority (PPRA) on matters within its jurisdiction;
- v. act as a secretariat to the Tender Board;
- vi. plan the procurement and disposal by tender activities of the procuring entity;

- vii. recommend procurement and disposal by tender procedures;
- viii. check and prepare statements of requirements;
- ix. prepare tendering documents;
- x. prepare advertisements of tender opportunities;
- xi. prepare contract documents;
- xii. issue approved contract documents;
- xiii. maintain and archive records of the procurement and disposal process;
- xiv. maintain a list register of all contracts awarded;
- xv. prepare monthly reports for the Tender Board;
- xvi. co-ordinate the procurement and disposal activities of all the department of the procuring entity; and
- xvii. prepare other reports as may be required from time to time.

4.3 User Department

The user department shall prepare a work plan for procurement based on the approved budget, which shall be submitted to the PMU for implementation when required and shall perform the following functions

Functions of the User Department

Specifically, the User Department shall function as per the Public Procurement Act (2004)

- a. liaise with and assist the PMU throughout the procurement or disposal by tender process to the point of contract placement;
- b. initiate procurement and disposal by tender requirements and forward them to the PMU
- c. propose technical inputs to statements of requirements for procurement requirements to the PMU;
- d. propose technical specifications to the PMU;
- e. input with technical evaluation of tenders received as required by the PMU;
- f. certify for payments to suppliers, contractors or consultants;
- g. report any departure from the terms and conditions of an awarded contract to the PMU;
- h. forward details of any required contract amendments to the PMU for action;
- i. maintain and archive records of contracts management; and
- j. prepare any reports required for submission to the PMU, the Tender Board or the Accounting Officer.

5. CATEGORY AND METHODS OF PROCUREMENT

5.1 Category of Procurement

The following are major groups of types of procurements

- i. Procurements of Goods
- ii. Procurements of Works
- iii. Procurement on Non- Consultancy Services
- iv. Procurement of Consultancy Services

Procurement of Goods and related services under the WSDP include pumps, water meters, generators, motors, machinery, water chemicals, transportation equipment, tools and equipment.

Works procured under this program will include construction and rehabilitation of water works sewerage systems and sanitation facilities. Water works varies from construction of wells, water tanks, dams, water treatment plants, distribution systems and drilling of boreholes. Wastewater works mainly include construction and rehabilitation of sewage treatment plants, sewer networks and pit latrines.

Non-Consultancy Services include: venues for workshops, training, cleaning, security, maintenance and repair services, etc., which will be selected on the basis of at least three quotations etc.

Consultancy Services include studies, preparation of detailed designs and tender documents, and supervision of construction services.

5.2 Methods of Procurement of Goods, Works and Non-Consultancy Services

The following procurement methods will be used to procure various goods and works and non-consultancy services required for implementation of the WSDP. The method to be used depends on the type, nature and thresholds of the contract:

- International Competitive Bidding (ICB)
- National Competitive Bidding (NCB)
- Restricted Bidding (RB)
- Shopping
- Direct Contracting (DC)

5.2.1 International Competitive Bidding (ICB)

The International Competitive Bidding method aims to ensure equal participation of contractors, service providers regardless of their nationality. The tenders shall be advertised nationally and internationally. World Bank procedures will be used for this method.

For any ICB contracts, invitation for bids will be advertised in the UN Development Business and dgMarket at the same time it will appear in the national newspaper of wide circulation. The MoW will on behalf of the other procuring entities whose contract is an ICB send a request to the development partners for arrangement of placement of ad text to the UN Development Business and dgMarket Website. Generally not less than six weeks from the date of invitation to bid or the date of availability of bidding documents, whichever is

later, shall be allowed for bidding. Where large works or complex items of equipment are involved, the period of bidding generally shall not be less than twelve weeks to enable prospective bidder to conduct investigations before submitting their bids. In such cases pre-bid conferences and site visits are encouraged.

Domestic preference shall apply in the evaluation of tenders if stated in the solicitation documents. This is applicable when using funds from the development partners of the WSDP.

Major steps involved in the procurement of works and goods will be as follows:

-
- Preparation of prequalification document (for large or complex contracts)
- Seek internal approvals and No Objection from the World Bank
- Advertise for prequalification
- Evaluation of pre-qualification
- Seek internal approvals and No Objection to prequalification evaluations
- Preparation bidding documents
- Seek internal approvals and No Objection to the draft bidding documents
- Advertise for opportunities to bid (in there was no prequalification)
- Open bids
- Evaluate bids
- Seeking internal approvals and No Objection to the evaluation report and recommendation for award of contracts
- Prepare draft contracts and Award contracts
- Seek internal approval to the draft contracts
- Sign contracts
- Supervise and administer the contracts
- Prepare final account and evaluate the contracts.

ICB contracts will also be advertised through UNDP and dgMarket website after securing approvals of the ad texts from development partners.

Winning consulting firm will be notified by the accounting officers of the respective procuring entities. These firms will be gazetted in the Government gazette and public notice boards.

5.2.2 National Competitive Bidding (NCB)

This method will be used for procuring goods other than those procured under the ICB procedures described above.

In NCB, a procuring entity (PE) shall invite suppliers, service providers and contractors to submit bids, regardless of their nationality, by means of a tender notice published only in the United Republic of Tanzania. However, foreign firms will not be excluded if interested.

NCB shall be used in cases where:

- (i) the contract value is small and does not exceed the threshold as outlined in the PAD and approved Procurement Plan
- (ii) the goods or works are available locally at prices below the international market.
- (iii) works are scattered geographically or spread over time, and
- (iv) works are labour intensive.

The notification of the invitation to tender shall be advertised in national newspapers of wide circulation and not less than four weeks will be provided for bidding.

5.2.3 Restricted Bidding

A procuring entity may restrict the issue of tender documents to a limited number of specified suppliers, contractors, or service providers when:

- a) Such suppliers, contractors or service providers have already pre-qualified in previous assignment
- b) The goods, works or services required are of a specialized nature
- c) The estimated contract values are within the limit for restricted threshold
- d) There is an emergency need such that there would be insufficient time for a PE to engage in open ICB or NCB, provided that the circumstance giving rise to the urgency is justifiable and not caused by dilatory conduct on its part.

The justification for restricting procurement must be shown in the record of procurement proceedings.

Except where suppliers, contractors or service provider have already pre-qualified, a PE issuing a restricted tender shall seek tenders from a list of potential bidders to ensure competitive prices.

5.2.4 Shopping

Shopping method is based on comparing price quotations obtained from at least three (3) different suppliers or contractors provided that the estimated value of the contract is within the threshold set for such procurement method. Successful quotation shall be that offering the lowest cost, but meeting quality specifications provided by the PE.

Shopping may be used where the desired goods are readily available off-the-shelf, or goods are of standard specification and of small value, or for simple civil works of small value.

A list of suppliers to be invited to submit quotations shall be approved by the respective tender board.

5.2.5 Direct Contracting

Prior to approval by Tender Board, the PE may engage in direct contracting under the following circumstances after obtaining a No Objection from the World Bank:

- a. situations where there is only one contractor or supplier
- b. where there is a need for continuity for on-going contract
- c. emergency procurement
- d. where an on-going project, additional items need to be purchased for completion of implementation
- e. any other mitigating factor(s) approved by the respective Tender Boards

5.3 Procurement of Consultant Services

Consultants includes a wide variety of private and public entities, including consulting firms, engineering firms, construction managers, management firms, procurement agents, inspection agents, auditors, UN agencies and other multinational organisations, investments and universities, research institutions Government agencies, NGOs and individuals.

In the course of implementation of the WSDP, consultants will be invited to provide consultancy services in a wide range of activities such as institutional reforms, capacity building and training, programme support services, engineering services, construction supervision, financial services, procurement services, social and environmental studies, technical and financial audits, communication services, programme reviews and evaluations.

Consultants are permitted to participate in the selection proceedings without regard to nationality, except in cases where the procuring entity decides, on grounds specified in the Procurement Act or Regulations or according to the provisions of any written law, to limit participation in selection proceedings on the basis of nationality.

5.3.1 Selection Procedures

Consultants' services for larger contracts (US Dollars one hundred thousand equivalent for firms per contract, and US Dollars fifty thousand equivalent for individual consultants per contract) shall be procured in accordance with the World Bank guidelines. For small contracts (below threshold mentioned in this paragraph) shall be procured in accordance with the Public Procurement (Selection and Employment of Consultants) Regulation, 2005. The procurement

methods to be used will depend on the type, nature and the thresholds of the services to be provided

The selection procedures will be outlined in the approved procurement plan. In addition evaluation criteria to be adopted (by means of RFP) shall be determined by the PE prior to invitation of consultants to submit proposals. Such criteria shall be considered by the appropriate tender board which will verify their suitability and make possible comments concerning them.

Four principal types of selection procedures shall be applied according to the characteristics of the services required, namely:

- a. selection procedure based on technical quality with price consideration;
- b. selection procedure based solely on technical quality;
- c. selection procedure based on compatibility of technical proposal and least cost considerations; and
- d. Selection procedure based on quality and fixed budget.

The adoption of any of the four principal types of selection procedures shall depend on the complexity of the assignment, the impact of the assignment on the resulting end product and the probability that the proposals will lead to comparable outputs.

Quality and Cost- Based Selection (QCBS)

Selection procedures based on the Technical Quality with price consideration shall generally be used for any contract of value equal or more than US Dollars one hundred thousand equivalent and shall use World Bank procedures. Major steps used in this method are as follows

- Prepare Terms of Reference (ToR) and cost estimates
- Seek clearance from the World Bank on the ToR and the cost estimates
- Advertise for Expression of Interest (EOI)
- Prepare shortlist of six consultants
- Seek internal approvals and No Objection on the shortlist
- Prepare draft Request for Proposal (RFP) documents
- Seek internal clearance and No Objection for the RFP
- Issue RFP to the shortlisted firms
- Open the technical proposals and evaluate
- Seek internal approval and No Objection on the technical evaluation report
- Open financial proposals
- Prepare combined evaluation report (technical and financial) and send a copy to the World Bank for information purpose
- Negotiate the contract with the highest combined scores
- Prepare draft contract
- Seek internal approval and No Objection of the draft contract
- Sign contract

- Execute the contract
- Prepare final account and evaluate the contract

A score of 100% shall be given to the lowest financial proposal and the score given to each of the other financial proposals is proportionately reduced. The technical and financial proposals shall be weighted as specified in the request for proposal and the combined value of the two proposals shall be calculated for each firm. Negotiations shall be initiated with the firm with the highest combined score.

Quality Based Selection

In the selection procedure the firm which has submitted the best technically acceptable proposal shall be the first to be invited for negotiations in accordance with Regulation 66 of the Public Procurement Act 2004. The financial proposal shall be opened in the firm's presence and its contents examined and where no agreement is reached, then the consultant whose technical proposal is ranked the second shall be invited for negotiations. The exercise may continue until an agreement is reached with one of the firms whose technical proposals are considered satisfactory and retained. The financial envelopes containing the proposals of firms not, invited for negotiations will be returned unopened to the offers.

Quality based selection is appropriate for the following types of assignments:

- (i) complex or highly specialized assignments for which it is difficult to define precise terms of reference and the required input from the consultants,
- (ii) assignments that have a high downstream impact and in which the objective is to have the best experts
- (iii) assignments that can be carried out in substantially different ways, such those proposals will not be comparable

The request for proposals may request submission of a technical proposal only or submission of both technical and financial proposals at the same time, but in separate envelopes and the request for proposals shall not provide the estimated budget. If technical proposals alone were invited, after evaluating the technical proposals, the PE shall ask the consultant with the highest ranked technical proposal to submit a detailed financial proposal so that the PE and the consultant shall then negotiate the financial proposal and the contract.

If consultants were requested to provide financial proposals initially together with the technical proposals, safeguards shall be built in to ensure that the price envelope of only the selected proposal is opened and the rest returned unopened, after the negotiations are successfully concluded.

Least Cost Selection

This method may be used for selection of consultants for assignments of a standard or routine nature where well established practices and standards exist, and in which the contract amount is small. The procedure starts with the evaluation of the technical proposal. Firms whose technical proposals are retained shall be those who scored equal or above the minimum specified threshold.

At the stage of examination of financial proposals, only the envelopes containing the financial proposals of consultants who scored equal or above the minimum specified threshold shall be opened. The consultant whose financial offer is the lowest shall be invited for negotiations.

Quality and Fixed Budget Selection

This method may be used when the assignment is simple and can be precisely defined and when the budget is fixed. The request for proposals shall indicate the available budget and request the consultants to provide their technical and financial proposals in separate envelopes, within the budget. Terms of reference shall be prepared to make sure that the budget is sufficient for the consultants to perform the expected tasks.

Evaluation of all technical proposals shall be carried out first and the price envelopes of those scoring above the minimum threshold shall be opened in public. Proposals that exceed the indicated budget shall be rejected. The consultant who has submitted the highest ranked technical proposal among the rest shall be selected and invited to negotiate a contract.

Selection Based on Consultants' Qualifications

This method may be used for very small assignments for which the need for preparing and evaluating competitive proposals is not justified. In such cases, the PE shall prepare the ToR, request expressions of interest and information on the consultants' experience and competence relevant to the assignment, establish a short list, and select the firm with the most appropriate qualifications and references. The selected firm shall be asked to submit a combined technical and financial proposal and then be invited to negotiate the contract.

6. PROCUREMENT PLANNING

6.1 General

Procurement Plans are intended to achieve transparency and predictability of the procurement activities and provide a good basis for monitoring progress and performance. They limit scope of non-compliance with agreed procedures and corruption. Procurement Plans facilitate smooth and timely procurement activities. In compiling such plans, a procuring entity shall first establish the appropriate method of procurement and the conditions for the use of each of them. All procurement of goods, works, non-consultant services and selection and employment of consultants shall be guided by planned procurement needs based on approved budgets. For detailed procurement planning rules reference shall be made to: (i) World Bank's Guidelines for selection and employment of consultants by World Bank Borrowers and for procurement under IBRD Loans and IDA Credits of May 2004 Revised October 2006, and (ii) "*Part V of the Public Procurement (Goods, Works, Non-Consultant Services and Disposal of Public Assets by Tender) Regulations, 2005*" and "*Regulation 25 of the Public Procurement (Selection and Employment of Consultants) Regulations, 2005*".

6.2 Stages in the Preparation of Procurement Plan

Procurement planning essentially sets out clearly the framework in which procurement will be done. The preparation of the plan implies a strategic decision about how procurement and contracting will be done. The planning will start by compiling a list of all known goods, works and services needed to be procured by the programme. This list then becomes the basis for deciding how these items should be combined or divided into contract packages, what method of procurement should be used for each, and the scheduling for procurement of each activity.

Planning for implementation shall involve preparation of a project work plan describing various project tasks and activities, including how the tasks will be accomplished and managed and identifying the resources necessary to carry out various programme activities. Procurement planning shall begin at the design stage during identification and preparation stages of the project cycle.

6.3 Contract Packaging

The objective in contract packaging is to group the procurement requirements in such a way as to ensure economy and efficiency in processing and delivery. A procuring entity shall not divide its procurement into separate contracts for the purpose of avoiding international or national competitive tendering. With prior approval of the procuring authority, a procuring entity may be allowed to split contracts to enable participation of local firms or persons.

Procuring entities shall plan their requirements in such a manner that the same goods or works are not procured more than once every six months within the limits given to the accounting officer or chief executive officer

The first step in grouping is to separate needs into goods, works and services categories. Normally contracts will be awarded within a single category, although there are exceptions: certain types of plant equipment, for example, are always procured on a “supply and install” basis where goods delivery and related installation services are combined in a single contract. Within each category, needs should be examined to see whether it is possible and sensible to combine similar or related items in a single package.

In the past, conventional wisdom held that substantial savings could be achieved through bulking of orders for like goods by getting economies of scale. With present order processing and shipping methods, significant price differences occur only with very large differences in quantities.

The ability of local suppliers of goods and services to meet programme needs and the likely interests of foreign bidders to participate in a tender are some of the factors to be considered when making contract packaging decisions. The scope and sizes of contract packages should be set in such a way that permits local firms to compete effectively. However, if there are reasons of economy or efficiency in choosing larger contract packages or if it is known or believed that foreign bidders will be interested in bidding, these should be the determining factors in contract packaging and sizing. In some cases it is possible to meet both of these needs by appropriate sizing and timing of contract awards.

Works contracts may be divided into individual packages that can be handled by local bidders. A small local contractor can bid for one or as many lots as it can handle, and a large foreign bidder can bid for all lots in the entire package, offering a discount if all or a specified number of lots are awarded to it.

A similar approach and results can be achieved in goods contracts by making the bid lots conform to local bidding capacities and then awarding contracts for a number of lots in the same bidding process, thereby allowing larger suppliers to offer discounts in the case of award of multiple lots.

6.4 Procurement Scheduling and Time Requirements

One of the considerations in choosing contract packaging is the timing when goods or services are needed. After preliminary packaging plans have been formulated and, by implication, the method of procurement to be used for each is tentatively determined by the nature and size of the packages, it is necessary to verify that these combinations will permit the goods or services to be delivered at the times they are needed. The best way to check this is to work backwards from the desired date of delivery to determine whether sufficient time is available to carry out the necessary procurement steps for each element.

6.5 Consolidation of Procurement Plans and Misprocurement

Procurement plans prepared by different procuring entities shall be posted to the Ministry of Water and will be consolidated by the PMU prior to submission to the World Bank for final approval.

Procurement entities should submit procurement plans 2-months before deadline for submission to WB for approval.

All procurement under the WSDP should be indicated in the procurement plan and appropriate procedures and methods of procurement as stipulated in the World Bank guidelines for selection and employment of consultants by World Bank Borrowers and procurement under IBRD Loans and IDA Credits of 2004 Revised October 2006 and the Public Procurement Act of 2004 followed. Any procurement that will be conducted outside the approved procurement plan and or not in accordance with the agreed provision of the Loan

Agreement will be declared misprocurement.

Example of procurement plan format is as found at the PPRA website (www.ppra.go.tz) and attached to this manual (Annex 3).

7. PROCUREMENT MONITORING AND RECORD KEEPING

7.1 Keeping of the Records

Under the WSDP, it is important to ensure continuous flow of information on all procurement activities. Periodic reports prepared by the various WSDP implementers (Mow, UWSAs, WBOs, LGAs, DDCA) shall contain the required information to ensure effective monitoring. Each implementing entity will be responsible for monitoring and recording its procurement activities. Recording of procurement activities will be computerised (see Annex 2).

7.2 Control of Procurement Documents – Shopping procedures

All Procuring Entities shall ensure valuable Procurement documents are securely kept. These documents must be controlled and accounted for from ordering, printing, receiving and recording, storing and issuing for usage and destruction of unwanted documents.

The documents to be under strict control are:

- (a) Procurement Orders
- (b) Goods Receipt Notes
- (c) Materials Requisition and Issue Note (MRIN)
- (d) Materials Transfer Note and
- (e) Materials Return Note.

In the following subsections, a systematic procedure for controlling and monitoring these documents from the stage of requisitioning for printing, receiving, storage, issuing and

destruction of unwanted documents is described.

7.2.1 Ordering and Printing

Ordering and printing of specified valuable documents will be made from a reputable printer contracted for this service. A printing agreement between the Procuring Entity and the printer specifying quality, quantity, serial numbers and delivery shall be concluded taking into account supplier sourcing procedures described herein above.

An order for printing shall specify the following requirements:

- (i) Specimen for the document to be printed
- (ii) Quantity required in pads
- (iii) Number of copies for each pad,
- (iv) Serial numbers to be assigned to pads and
- (v) Date of delivery required.

7.2.2 Delivery from Printer

At the time delivery from printer is made, the following shall be carried out:

- (i) Inspect for quality and specification
- (ii) Verify serial numbering and quantity
- (iii) Receive the documents per printer's delivery note
- (iv) The document will be passed to the Stores officer who will raise a goods receipt note.

7.2.3 Records and Issue to Users

A register for recording receipt and issues to users shall be maintained. The user shall produce evidence of use of the last issue. The book copy of the specified valuable document together with approved requisition for replacement shall be the basis for issuing another accountable document to the user.

7.2.4 Physical Movement Control

On making the issue to users, the responsible accountant shall verify the serial number of used pads to the original records of issue so as to verify that:

- (i) The returned used pad was issued from store
- (ii) The serial numbers have been used serially
- (iii) and any cancelled the original and copies are attached and
- (iv) Verify the MRIN for appropriateness of approval for the new issue.

A register for all valuable accounting documents shall be kept to control and monitor the movement of such documents.

The register shall contain the following particulars:

- (i) Type of document

- (ii) Standard form in pad
- (iii) Receipt date and GRN reference
- (iv) Quantity received in pads with opening and closing serial numbers and
- (v) Issue date and MRIN reference.

Upon certification on the completeness of the requisition, the issue shall be made and the recipient shall acknowledge by appending the signature in the appropriate section in the register.

7.3 Stock Checking

The Internal Auditor shall arrange for occasional checks of the balance of unused valuable documents. The book register balance shall be compared with the physical balance of each of the valuable document.

7.4 Destruction of Unwanted Documents

Out of date or other unwanted valuable documents shall be listed and brought to the attention of the Procuring Entity for approval of destruction.

7.5 Procurement Filing System

Each procuring entity shall have in place a satisfactory system to record all procurement transactions and a satisfactory system for filing all related documents. Furthermore, each procuring entity shall have its own registry to maintain every copy of the procurement documents

A proper filing system is, in addition to being the essential measure of transparency, a necessary condition for efficiency in the procurement process. The filing system will provide the procurement officer with an easy retrieval mechanism to facilitate quick response to queries from contractors and other stakeholders; as well as facilitate auditing.

7.6 File Organisation

The files should be organised by category of procurement. The filing area should be separated and properly marked for Works, Goods, Non-Consultancy Services, Consultancy Services, and Operating Costs.

7.7 Organisation of Paperwork

Paper work is preferably organised in 'accordion' or 'magazine' type files because these types of files enable one to insert bound documents in their original form without having to punch them. Each contract must have its own file. Where a single contract

has more paperwork than can fit in one file, additional files should be used and must be tagged with volume numbers and kept in the same location.

The files must be marked with:

- (i) contract number and description as per the procurement plan
- (ii) tender number
- (iii) lot number
- (iv) volume

Each file will be further separated (using separators or separate files) for each of the contract stage. The separators should be marked with the stage as described in the different procurement methods.

7.8 Contract Register

A Contract Register will maintain contract records, including amounts from agreed contracts, subsequent changes in accordance with the contract provisions and properly approved and adjusted to the amounts in the contracts records. The register will also record information such as retention withheld for each contract; amounts invoiced, approved, and date of approval, amounts payable, paid and deferred for future payment. It will also record payments against contracts and dates of payments with explanations for payments that have been delayed.

Each procurement transaction shall be recorded in the contract register immediately as it occurs.

ANNEXES

Important annexes have been included in this chapter. These annexes are intended to assist the Procuring Entities to:

- (i) conduct the evaluation of tenders in a proper manner,
- (ii) set appropriate tender processing periods,
- (iii) prepare procurement plans,
- (iv) monitor contract management,
- (v) properly conduct tender openings,
- (vi) properly conduct tender pre-qualifications, and
- (vii) prepare quality monitoring reports.

PROCUREMENT CHECKLISTS

This annex contains key checklists for prequalification, EOI, Bid Opening and for proposal opening adopted from the Public Procurement Regulatory Authority official website (www.ppra.go.tz) and at the official website of the World Bank (www.worldbank.org).

(i) Checklist for Prequalification Submission

Applicants should be required to submit the following in respect of their organization and legal status:

- (a) name, postal and street addresses, telephone, fax and telex numbers;
 - (b) for corporations, copies of original documents defining legal status, place of incorporation and principal place of business;
 - (c) for partnerships and individually owned firms, copies of original documents defining legal status, place of registration, principal place of business and nationality of owners;
 - (d) designation of the individual(s) authorized to act for the organization;
 - (e) information on the nature and results (where applicable) of any litigation in which the applicant was involved in the last five years, including any current litigation;
 - (f) authorization for the Borrower to seek detailed references with regard to financial standing or experience; and
 - (g) if a joint venture or other form of association, a document of intent to form a joint venture or association should be submitted. The document should define the capital contributions of the partners and sharing of profit and losses among them; the participation of the firms in the contract and the division of work, including the responsibility for overall management and coordination and the representation of the joint venture for purposed of prequalification, bidding and contract. Each member firm should respond individually and fully to all prequalification questions.
1. The following financial information should be required from the applicants:
- (a) annual financial statements for the last five years, including an interim statement not over six months old. These should be supported by audit statements or tax returns;
 - (b) financial projections for the next two years, including the effect of known commitments;
 - (c) name and address of the applicant's banker, identification of individuals familiar with the applicant's standing,
 - (d) names and addresses of the applicant's insurers, identification of individuals familiar with the applicant's standing and a statement from the applicant's insurer that it is prepared to insure the applicant as described in the prequalification document;

- (e) statement from the applicant's bank, insurer or other surety that it is prepared to issue bid guarantee or bond (as required by the prospective bid documents); and
 - (f) documents to demonstrate availability of lines of credit, overdraft facilities, supplier's credit, unencumbered assets, or other proof of capability to comply with the financial requirements of the prequalification document.
2. The following technical information should be required from the applicants:
- (a) Details of the experience and past performance of the applicant on works of similar Qualification of Bidders nature within the past five years, including projects under way and contracts awarded but not started. These details should include:
 - name of project and location;
 - owner of sponsoring organization;
 - brief description of contract, cost, details of the principal quantities involved, methods and type of equipment used (where relevant to the project for which the contractor is applying for prequalification), whether liquidated damages were applied and the dates of commencement and (initial planned and effective) completion. For contracts recently awarded, the dates will be those estimated or written into the relevant contract;
 - extent of the applicant's participation in the contract, degree of responsibility and the names of associated companies and/or main subcontractors (if any); and
 - names and addresses of responsible officials, entities and consultants familiar with the project undertaken.
 - (b) For contracts where specialized or major equipment which cannot easily be purchased, hired or leased is necessary: availability of items of construction equipment (and fabrication facilities, if appropriate) essential for carrying out the prospective contract. Descriptions should include type, capacity, age, condition and ownership status (presently owned, leased, to be purchased, liens thereon, etc.);
 - (c) Types and amounts of work of the contract likely to be subcontracted, with names and addresses of major subcontractors to be used, if known. For those proposed to undertake more than 10 % of the contract value, it is recommended that the subcontractor(s) reply individually and fully to all prequalification questions; and
 - (d) applicant's staff from whom the proposed key personnel will be drawn, including their role in contract implementation, their present positions, years of experience with the applicant and in construction in general, major previous responsibilities including the type and value of contracts worked on, and pertinent language abilities and experience in the region.

(ii) Expression of Interest Check List

- (1) To obtain Expression of Interest, the procuring entity shall advertise contracts in the PPRA's journal and website, UN Development Business and dgMarket online (for contracts expected to cost more than US Dollars two hundred thousand equivalent per contract) and national newspaper of wide circulation
- (2) A copy of the advertisement shall be posted on the notice board of the procuring entity and on the notice board of the appropriate tender board.
- (3) The advert shall request a minimum of fourteen days for a firm to express interest
- (4) A tender board may request the procurement management unit to expand or reduce a shortlist; however, once a tender board has approved a shortlist, and a World Bank issued a No Objection, a procurement management unit shall not add or delete names without a tender board's concurrence and a new On Objection from the World Bank.
- (5) Any consultant, who wishes to provide the requested services, shall express his desire in writing to be shortlisted to the procuring entity concerned. However, an Expression of Interest to participate in the provision of services shall in no way oblige the procuring entity to include the applicant in the shortlist.

(iii) Bid Opening Checklist

(To be filled out for each bid as it is read out)

Contract Reference:

Bid Opening Date: Time:

Name of Bidder:

(a) Is outer envelope of bid sealed?

(b) Is bid form completed and signed?

(c) Expiration date of bid:

(d) Is documentary authority for signing enclosed?

(e) Amount of bid security (if required): (state currency)

(f) Describe any "Substitution," "Withdrawal," or "Modification" submitted

(g) Describe any alternative bid made:

(h) Describe any discounts or modifications offered:

(i) Additional comments:

(j) Name of bidder or representative present:

(k) Total bid price: (list currencies and amounts or percentages)

Signature of responsible official: Date:

(iv) Proposal Opening Checklist

Proposal opening checklist is divided into two stages namely:

- (i) Technical Proposal Opening, and
- (ii) Financial Proposal Opening

- a) The procuring entity shall allow time for the consultants to prepare their proposals depending on the assignment.
- b) The Technical and Financial Proposals shall be submitted at the same time, no amendment to the technical or financial proposals shall be accepted after the dead line.
- c) To safeguard the integrity of the process, the technical and financial proposals shall be submitted in a manner specified in the request for proposals. The technical proposal shall be opened in public immediately by respective tender board after the closing time for submission of proposals.
- d) The proposals shall be numbered serially and the last one endorsed with "and last"
- e) The financial proposals shall remain sealed and shall be deposited with the secretary of the respective tender board until they are opened publicly.
- f) Any proposal received after the closing time for submission of proposals shall be returned unopened.
- g) The secretary of the tender board shall prepare minutes of the opening ceremony giving all the details of the opening. The following tables dully filled shall form part of the Minutes. The minutes shall be signed by chairman and the secretary of the opening ceremony.
- h) The signed minutes of the opening ceremony may be provided on request to consultant who submitted proposals.
- i) After approval and a No Objection (if applicable) of the technical evaluation report, the procuring entity shall invite consultants who scored above the minimum pass marks specified in the RFP to attend a public openinf of financial proposals. A procuring entity shall allow sufficient time for consultants to attend the opening of financial proposals

(i) Technical Proposal Opening Checklist
Tender No

Date: Opening from -----to

No.	Name of Firm	Country	Outer Envelope Sealed	FP Envelope Sealed	Remarks

Mr./Ms (Name). (Signature), Member representing Client, read out the names of Consultants, and

Mr./Ms. (Name) (Signature)..... representing verified and confirmed the names of Consultants.

(ii) Financial Proposal Opening Checklist
Tender No

Date: Opening from -----to

No.	Name of Firm and Country	Financial Proposal and Currency Price	Remarks

Mr./Ms (Name). (Signature), Member representing Client, read out the names of Consultants and their proposal prices, and

Mr./Ms. (Name) (Signature)..... representing verified and confirmed the names of Consultants and their proposal prices.

(v) Proposal Evaluation Checklist

General factors

- (a) Has the consultant responded with an appropriate technique or is he/she trying to fit the problem to a favourite technique?
- (b) What priority will this project receive from the consultant?
How important will it be to his/her firm?
- (c) Does the protection meet the terms of reference and the intended scope of the study?
- (d) How useful or capable implementation will the end product be?
- (e) What degree of originality is present in the proposal?
- (f) Are the submission of progress reports and presentation of interim briefings required?
- (g) What progress reports and interim briefings are planned?
- (h) What degree of direct consultant – client liaison is proposed?
Does the consultant –client relationships include a training component for the client's personnel? What type of training is proposed?
- (i) Is the proposed content of progress reports in accordance with the requirements of the client?
- (j) Will progress reports contain a monthly statement of costs incurred, commitments if necessary, as revised estimate of total costs?
- (k) When the project is completed, how does the consultant intend to hand over the project?
- (l) What degree of follow-up and/or debriefing is proposed?
- (m) To whom do the relevant data belong and what happens to them when the project is completed?

Past Performance

- (a) Is the usual business of the consultant closely related to the proposed work?
- (b) Does the references' to past experience include activities specially related to the
equirements to the proposed study?
- (c) Has the consultant been honoured by professional societies because of his/her performance in a specific professional area?
- (d) What reputation does the firm hold in the area of the proposed assignment?
- (e) Has the firm worked for this client before, and if so, with what success?
- (f) Are statements of past performance worded so as to identify what work was actually performed?
- (g) Are there aspects of past performance that indicate particular weaknesses or strengths?

Scope of work

- (a) Has the proposal demonstrated an understanding of the problems to be solved?
- (b) Is this assignment area new to the consultant?
- (c) Has the consultant made an accurate assessment of the problem based on an interpretation of the requirements set forth in terms of reference?
- (d) Has the consultant presented an approach that will achieve the stated objectives?
- (e) Is the proposed approach supported with justification of why it should achieve the objectives?
- (f) Do you think the suggested approach will work?
- (g) Has the consultant introduced unanticipated events which may result in a project overrun or an expanded scope of work?
- (h) Does the proposal distinguish between the simpler and more difficult performance requirements?
- (i) Does the proposal convincingly show a depth of understanding of the problem?
- (j) Are the technical problems clearly delineated or are they merely 'parroted' from the request for proposals?
- (k) Have the limits of the problem been specified to show that the proposed assignment will be restricted to an appropriate scope?
- (l) Is there a concise but adequate review of literature? If yes, is the literature review merely an annotated bibliography or is it a scholarly critique?
- (m) Are the specific objectives of the proposal clearly stated?
Are these goals realistic in view of time, equipment, budget, and professional experience of the principal investigator?
- (n) Is the proposal fully responsive to all written requirements and specifications?
- (o) Are there any apparent discrepancies or omissions?
Are the outputs clearly defined and presented?

Personnel

- (a) Is it clear which tasks in the assignment specific personnel will be assigned to and for what amount of time?
- (b) Are the personnel assigned to specific tasks qualified by training and experienced to perform the tasks successfully?
- (c) Is there a clear organization chart depicting project management?
Is there realistic apportionment of personnel level and time to specific tasks?
- (d) What assurances are made concerning the availability of personnel proposed? Was a contingency plan requested if certain personnel become unavailable?
- (e) Have enough time and personnel been included to provide adequate administrative management of the study?

- (f) Does the success of the project depend, to a large degree, upon personnel not directly associated with the prospective firm?
- (g) Do the curriculum vitae (CVs) relate specific experience of personnel to the specific needs of the assignment?
- (h) Does the proposal show the capabilities of the management to handle a project of the size contemplated?
- (i) Is the position of the programme manager in the overall organization and the limits of his/her authority and responsibility shown?
- (j) Are the type, frequency, and effectiveness of management controls and method for corrective action shown?
- (k) Is it clearly demonstrated that top-level management will maintain a high level of interest and assume responsibility for successful accomplishment of the programme?
- (l) Is the proposal dependent upon recruitment of key personnel?

Planning and management

- (a) Has the work schedule been specified clearly, and is it realistic in terms of time and money? Does it fit with available personnel?
- (b) If time of performance is important and is a competitive evaluation factor, is the proposed schedule supported by the technical proposal?
- (c) Is the planning realistic? Does it follow recognized and accepted procedures?
- (d) Does the proposal show that delivery schedule will be met and how it will be met?
- (e) Are the various technical phases of the project detailed and realistically scheduled?
- (f) Are effective review, evaluation, and control provided at specific checkpoints?
- (g) Has the consultant allowed for all necessary clearances?

Facilities

- (a) Are the facilities and equipment needed to successful completion of the study specified in the proposal?
- (b) How does the consultant intend to access the facilities not at the client's site?
- (c) Does the use of facilities outside the client require a subcontract? If so, is the proposed subcontract specifically mentioned, along with an explanation of the required qualifications?
- (d) Is the planned use of the facilities such as printing, data procession, etc. realistic?
- (e) If computer services are required, are these controls built into the processing so that corrective action can be taken at intermittent points, if necessary?
- (f) Is any procuring entity – furnished equipment required?

- (g) Are the proposed laboratory and test facilities adequate for the requirements of the technical scope of work?
- (h) Are resources over-committed?

Cost

- (a) Is the overall cost within range of the procuring entity's budget?
- (b) What is the relationship between the cost figures and equivalent items in the technical proposal?
- (c) Are the personnel costs reasonable according to the tasks to be performed?
- (d) Are the appropriate personnel assigned to perform the appropriate tasks?
- (e) Has expenditure been set aside for subcontracting requirements, such as data processing?
- (f) Have costs for development, for instruments, for purchase of materials, such as scoring sheets etc. been included?
- (g) Does the travel budget seem reasonable when compared to the tasks to be accomplished?
- (h) If consultants or experts are included, is their daily rates reasonable and within proper financial range?
Is the proposed travel time reasonable?
- (i) Is an appropriate type of contract requested?
- (j) Is the schedule of payments acceptable?
- (k) Have appropriate procedures been used to estimate costs?

FORMATS OF PROGRESS MONITORING REPORTS

Presented here below are some of the samples used in getting Progress Monitoring Reports related to procurement. These include:

(i) Output Monitoring – Contract Management**Output Monitoring Report - Contract Management**

as at -----(date) in -----(currency)

Contract Number	Contract Description	Actual Progress to date	Actual Cost to date	Planned Cost to date	Variance	Revised Plan to completion		Original Plan to completion	
		Physical Output				Total Cost	Completion Date	Total Cost	Completion Date
102	Building Construction Phase I -- Foundation	60% completed	4,000,000	3,600,000	400,000	6,900,000	9/30/2006 (15 months)	6,000,000	6/30/2006' (12 months)
	Phase II -- Walls	20% completed	2,100,000	2,000,000	100,000	10,500,000	11/30/2006 (15 months)	10,000,000	8/31/2006 (12 months)
	Phase III " Roofing & Finishing	nil	-	-		5,000,000	8/31/2007 (8 months)	5,000,000	1/31/2007 (8 months)
108	Technical Assistance								
	Detailed Design	2nd draft completed	800,000	800,000	-	1,000,000	4/30/2006 (24 months)	1,000,000	4/30/2005 (24 months)
	Bid evaluation assistance	nil	-	-		300,000	2/28/2008 (3 months)	300,000	2/28/2008 (3 months)

NOTES

/i: This report provides contract information on a project from inception to the latest reporting date.

/ii: As per contract.

(ii) Contract Expenditure Report (Goods and Works)

Contract Expenditure Report (Goods and Works)

as at -----Date

Disbursement Category	Contract Description	Procurement Method /ii	Contract Number /iii	Supplier/ Contractor	Nationality	Contract Currency	Contract Value	Amount Invoiced to date	Amount paid to date	Expenditure Type /iv
1)	Goods	ICB								
		NCB								
		NS								
2)	Works	NS								
		NCB								
		DC								

NOTES

/i: This report provides procurement information for the project from inception to the latest reporting date.

/ii: Each method in Procurement Guidelines should be shown separately-

/iii Amendments should be included as an additional line with the same contract number and should indicate the amendment number.

/iv Foreign, local (ex factory) or local (other)

ICB = international Competitive Bidding NCB = National Competitive Bidding NS = National Shopping DC = Direct Contracting

(iii) Contract Expenditure Report (Consultants' Services) as at ----- (date)

Disbursement Category Number Description	Selection Method /ii	Contract Number /iii	Contract Description	Consultant	Nationality	Contract Currency	Contract Value	Amount Invoiced to date Invoiced to date	Amount Paid to date	Expenditure Type /iv
	QCBS									
	QBS									
	FBS									
	LCS									
	SSS									

NOTES

/i: This report provides procurement information for the project from inception to the latest reporting date.

/ii: Each method in Consultant Selection Guidelines should be shown separately.

/iii: Amendments should be included as an additional line with the same contract number and should indicate the amendment number.

/iv: Foreign or local.

QCBS = Quality and Cost-based Selection, QBS = Quality-based Selection, FBS = Fixed Budget Selection, LCS = Least Cost Selection, SSS = Single Source Selection

PROCUREMENT PLAN FOR GOODS, WORKS AND NON-CONSULTANCY SERVICES - SUBMISSION TO PPRA

Name of Procuring Entity: [Redacted]

FINANCIAL YEAR: [Redacted]

Description	Tender No.	Lot Number	BASIC DATA		Gen. Proc Notice Advert	PRE-QUALIFICATION			INVITATION AND AWARD OF B			
			Estimated Amount in '000 Tshs	Procurement Method		Invitation Date	Closing-Opening	Notification of Applicants	Bid Invitation Date	Bid Closing-Opening	Approval Eval Report	Net
1	2	3	4	5	6	7	8	9	10	11	12	
Total Cost												

PROCUREMENT PLAN FOR GOODS, WORKS AND NON-CONSULTANCY SERVICES - EXTERNAL USE

Name of Procuring Entity: [redacted]

FINANCIAL YEAR [redacted]

Description	Tender No.	Lot Number	Procurement Method	PRE-QUALIFICATION			Invitation for Bids and contract signature		
				Invitation Date	Closing-Opening	Notification of Applicants	Bid Invitation Date	Bid Closing-Opening	Notification of Award
1	2	3	4	5	6	7	8	9	10

PUBLIC PROCUREMENT REGULATORY AUTHORITY

Guidelines on Filling the Procurement Plan Template for Consultancy Services

1. An Annual Procurement Plan (APP) is a mandatory feature of the procurement policy framework as articulated in PPA 2004. The approval of APP in a Management Meeting of a PE which is chaired by the Accounting Officer or Chief Executive Officer can be used to achieve the requirement that all procurement must have the approval of the Accounting Officer or Chief Executive Officer. It can further be used as a monitoring tool to ensure that all planned procurement follow the procedures and target dates.
2. The Procurement Plan Template for Consultancy Services has been prepared to fulfill the requirements of Section 45 of the PPA 2004 and Regulations 26 and 25 of GN. 98 of 2005.
3. Three kinds of APP Templates are introduced in this Guideline as shown below. A Soft Copy of the Guideline is contained in a Worksheet designated as **APP-GN98-GFU**.
 - 3.1 **Template of APP for Internal Use:** This Template is contained in a Worksheet designated as **APP-GN98-IU**. It gives detailed information about each procurement to be carried out by a PE including key dates for which certain actions must be completed by its staff to ensure that there is no delay in the procurement process. For each tender, two rows are provided: one for recording the planned dates for various actions and one for filling in actual dates when the actions were implemented.
 - 3.2 **Template of APP for External Use:** This Template is contained in a Worksheet designated as **APP-GN98-EU**. It gives detailed information about each procurement to be carried out by a PE through open competition and it forms part of the GPN to be made available to potential consultants. It aims at notifying potential consultants of procurement opportunities available in a PE. In this template information regarding particulars of the assignments, dates for advertisement, dates for invitation to submit proposals and notification of consultants are given.
 - 3.3 **Template of APP for Submission to PPRA:** This Template is contained in a Worksheet designated as **APP-GN98-PPRA**. It gives detailed information about each procurement to be carried out by a PE including key dates for notifying potential consultants of the tender proceedings and results of the tender process. This is required to be submitted to PPRA at the start of the financial year to enable PPRA be aware of the procurement volume for that particular year and enable it plan its monitoring activities accordingly.
4. **Abbreviations used in this Guideline**

APP	Annual Procurement Plan
FP	Financial Proposal
GN.98	The Public Procurement (Selection and Employment of Consultants) Regulations, GN. No. 98 of 2005
GPN	General Procurement Notice
PE	Procuring Entity
PMU	Procurement Management Unit
PPA 2004	Public Procurement Act No. 21 of 2004
PPRA	Public Procurement Regulatory Authority
RFP	Request for Proposal
TB	Tender Board
TP	Technical Proposal

Column No.	Guidance on the Information to be filled in the respective column of the Template	Corresponding Column in the APP Template for External	Corresponding Column in the APP Template
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		Use	for Submission to PPRA
01-06	<i>These columns gives details of various tenders to be floated by the PE, their estimated values and selected procurement methods</i>	01-06	01-04
01.	This column shall include a brief description of the Consultancy Assignment e.g. Consultancy Services for Carrying Out Detailed Design for Rehabilitation of XXX Road	01	01
02.	This column shall include the designated tender number. For easy identification of the PEs, PPRA shall issue code numbers to identify each PE. The tender number shall be preceded by the code number of the PE and the respective financial year. For example, if the code number of the PE is P01 and the financial year is 2006/7, the tender numbers shall be preceded by P01-2006/7-	02	02
03.	This column shall indicate lot numbers in case of a tender divided into lots. When there is only one lot, this shall be shown in this column as a single lot.	03	03
04.	This column shall indicate the estimated value of the procurement for each lot. The estimated value shall to a large extent reflect the budgeted amount for that procurement. To assist PEs to prepare correct estimates, the Research and Documentation Section of PPRA shall prepare price indices for various items based on consultancy assignments carried out in the previous years.	This information is not required for disclosure to the potential bidders as it will tend to influence prices	04
05.	Procurement Method to be adopted shall be shown in this column. Determination of the appropriate method shall be guided by Part III- Methods of Selection of the GN. 98.	04	05
06	In this column the method of selection adopted shall be given. Determination of the appropriate selection method shall be done in accordance with Part IV - Selection Procedures and Conditions for Application of GN. 98	05	06
07	Indicate the selected type of contract in accordance with Part VII- Types of Contracts and the Conditions of their use of GN. 97.	06	07
08	For tenders where open competitive methods have been found to be appropriate, they shall be advertised in the GPN. The date earmarked for the GPN shall be shown in this column. To cut down on the costs of advertising, the PE should consider using a minimum number of GPN consisting of several tenders.	This is not required since the whole of this document consist GPN	08
09-12	<i>These columns apply for Tenders where Invitation of Expression of Interest need to be carried out prior to inviting tenders.</i>	07-09	09-11
09.	This column shall indicate the date when the PE expects to advertise for the Invitation for Expression of Interest	07	09
10.	This column shall indicate the expected deadline for the submission and opening of the Expression of Interest entries. Statutory periods from the date of advertising to the submission of the applications are given in the Third Schedule of GN. 98. They are 30 days and 14 days for the international and national competitive selection respectively.	08	10

11.	In this column, the PE shall indicate the deadline by which the evaluation of Expression of Interest entries must be completed to ensure that subsequent stages of the procurement are not affected.	This information is for internal use to the I	
12.	This column indicates the deadline by which the Expression of Interest evaluation report must be approved by the TB in order to ensure that subsequent stages of the procurement are not affected.	09- <i>The successful applicants must be immediately be informed after the approval of shortlist is done by the TB</i>	11
13-21	<i>These columns gives the details of the actual tender process starting from the preparation of bidding documents to the approval of award of contract.</i>	10-12	12-15
13.	In this column, the PE shall indicate the deadline by which the RFP Document must be ready for approval in order to ensure that subsequent stages of the procurement are not affected. This deadline may be in parallel with deadlines for actions under those columns 09 to 12.	This information is for internal use to the I	
14.	This column indicates the deadline by which the RFP Document must be approved by the TB in order to ensure that subsequent stages of the procurement are not affected. The approval of the document can be delegated to the PMU. In cases of tenders with Invitation for Expression of Interest, in order to avoid delays, this date could be the same as that appearing in column 12	This information is for internal use to the I	
15.	This column shall indicate the date when the PE expects to issue of RFP documents to the shortlisted consultants.	10	12
16.	This column shall indicate the expected deadline for the submission and opening of the RFP. Statutory periods from the date of invitation to the submission of the proposals are given in the Third Schedule of GN. 98. They are 45 days and 30 days for the international and national competitive selection respectively.	11	13
17.	In this column, the PE shall indicate the deadline by which the evaluation of TP must be completed to ensure that subsequent stages of the procurement are not affected..	This information is for internal use to the I	
18.	This column indicates the deadline by which the TP evaluation report must be approved by the TB.	This information is for internal use to the I	
19.	This column indicates the set date for opening of FP. Normally it is two weeks from the date specified in Column 18. A shorter period may be fixed if all Consultants have qualified to have their FP opened and have confirmed to attend the opening meeting	This information is for internal use to the I	
20.	This column indicates the deadline by which the Combined evaluation report must be completed.	This information is for internal use to the I	
21.	This column indicates the deadline by which the combined evaluation report must be approved by TB	12- <i>The successful bidder must immediately be informed after the approval of contract award is done by the TB</i>	14/15
22-24	<i>These columns gives the details of the final actions towards formalization of the contract.</i>		

22	In this column the amount of the contract award shall be inserted. In the planned row it is expected to insert the estimated (budgeted amount) of the particular tender. In the actual row PE shall insert the amount of the contract award approved by the TB	This information is for internal use to the PE. However PPRA shall obtain the award information on the Reports to be submitted on the implementation of each procurement.
23	In this column the PE shall fill in the expected date for contract for contract award. For planning purposes this date shall be the determinant of the dates by which the preceding actions must be completed so that the award of the contract is made by this date	
24.	In this column the PE shall fill in the expected date for signing of the contract.	

For More Information and Guidance, Contact

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PUBLIC PROCUREMENT REGULATORY AUTHORITY

Guidelines on Filling the Procurement Plan Template for Goods, Works and Non-Consultancy Services

1. An Annual Procurement Plan (APP) is a mandatory feature of the procurement policy framework as articulated in PPA 2004. The approval of APP in a Management Meeting of a PE which is chaired by the Accounting Officer or Chief Executive Officer can be used to achieve the requirement that all procurement must have the approval of the Accounting Officer or Chief Executive Officer. It can further be used as a monitoring tool to ensure that all planned procurement follow set procedures and target dates.
2. The Procurement Plan Template for Goods, Works and Non-Consultancy Services has been prepared to fulfill the requirements of Section 45 of the PPA 2004 and Regulations 40, 46 and 47 of GN. 97 of 2005.
3. Three kinds of APP Templates are introduced in this Guideline as shown below. A Soft Copy of the Guideline is contained in a Worksheet designated as **APP-GN97-GFU**.
 - 3.1 **Template of APP for Internal Use:** This Template is contained in a Worksheet designated as **APP-GN97-IU**. It gives detailed information about each procurement to be carried out by a PE including key dates for which certain actions must be completed by its staff to ensure that there is no delay in the procurement process. For each tender, two rows are provided: one for recording the planned dates for various actions and one for filling in actual dates when the actions were implemented.
 - 3.2 **Template of APP for External Use:** This Template is contained in a Worksheet designated as **APP-GN97-EU**. It gives detailed information about each procurement to be carried out by a PE through open competition and it forms part of the GPN to be made available to potential bidders. It aims at notifying potential bidders of procurement opportunities available in a PE. In this template information regarding particulars of tender, dates for advertisement and notification of bidders are given.
 - 3.3 **Template of APP for Submission to PPRA:** This Template is contained in a Worksheet designated as **APP-GN97-PPRA**. It gives detailed information about each procurement to be carried out by a PE including key dates for notifying potential bidders of the tender proceedings and results of the tender process. This is required to be submitted to PPRA at the start of the financial year to enable PPRA be aware of the procurement volume for that particular year and enable it plan its monitoring activities accordingly.
4. **Abbreviations used in this Guideline**

APP	Annual Procurement Plan
GN.97	The Public Procurement (Goods, Works, Non-Consultancy Services, and Disposal of Public Assets by Tender) Regulations, GN. No. 97 of 2005
GPN	General Procurement Notice
PE	Procuring Entity
PMU	Procurement Management Unit
PPA 2004	Public Procurement Act No. 21 of 2004
PPRA	Public Procurement Regulatory Authority
TB	Tender Board

Column No.	Guidance on the Information to be filled in the respective column of the Template	Corresponding Column in the APP Template for External Use	Corresponding Column in the APP Template for Submission to PPRA
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01-06	<i>These columns gives details of various tenders to be floated by the PE, their estimated values and selected procurement methods</i>	01-04	01-04
01.	This column shall include a brief description of the Tender e.g. Tender for the Supply of Office Stationery	01	01
02.	This column shall include the designated tender number. For easy identification of the PEs, PPRA shall issue code numbers to identify each PE. The tender number shall be preceded by the code number of the PE and the respective financial year. For example, if the code number of the PE is P01 and the financial year is 2006/7, the tender numbers shall be preceded by P01-2006/7-	02	02
03.	This column shall indicate lot numbers in case of a tender divided into lots. When there is only one lot, this shall be shown in this column as a single lot.	03	03
04.	This column shall indicate the estimated value of the procurement for each lot. The estimated value shall to a large extent reflect the budgeted amount for that procurement. To assist PEs to prepare correct estimates, the Research and Documentation Section of PPRA shall prepare price indices for various items based on tenders carried out in the previous years.	This information is not required for disclosure to the potential bidders as it will tend to influence prices	04
05.	Procurement method to be adopted shall be shown in this column. Determination of the appropriate method shall be guided by Part VI - Methods of procurement and their conditions for use of the GN. 97.	04	05
06.	For tenders where open tendering methods have been found to be appropriate, they shall be advertised in the GPN. The date earmarked for the GPN shall be shown in this column. To cut down on the costs of advertising, the PE should consider using a minimum number of GPN consisting of several tenders.	This is not required since the whole of this document consist GPN	06
07-12	<i>These columns apply for Tenders where pre-qualification of bidders need to be carried out prior to inviting tenders.</i>	05-07	07-09
07.	In this column, the PE shall indicate the deadline by which pre-qualification documents must be ready for approval in order to ensure that subsequent stages of the procurement are not affected..	This information is for internal use to PE	
08.	This column indicates the deadline by which pre-qualification documents must be approved by the TB in order to ensure that subsequent stages of the procurement are not affected. The approval of the documents can be delegated to the PMU.		
09.	This column shall indicate the date when the PE expects to advertise for the pre-qualification process.	05	07

10.	This column shall indicate the expected deadline for the submission and opening of the pre-qualification entries. Statutory periods from the date of advertising to the submission of the applications are given in the Third Schedule of GN. 97. They are 30 days and 21 days for the international and national competitive bidding respectively.	06	08
11.	In this column, the PE shall indicate the deadline by which the evaluation of pre-qualification entries must be completed to ensure that subsequent stages of the procurement are not affected..	This information is for internal use to PE	
12.	This column indicates the deadline by which the pre-qualification evaluation report must be approved by the TB in order to ensure that subsequent stages of the procurement are not affected. This shall also be the date for notifications of the outcome of the pre-qualification process.	07- The successful applicants must be immediately be informed after the approval of shortlist is done by the TB	09
13-18	<i>These columns gives the details of the actual tender process starting from the preparation of bidding documents to the approval of award of contract.</i>	08-10	10-13
13.	In this column, the PE shall indicate the deadline by which the Tender Document must be ready for approval in order to ensure that subsequent stages of the procurement are not affected.This deadline may be in parallel with deadlines for actions under columns 07 to 12.	This information is for internal use to PE	
14.	This column indicates the deadline by which the Tender Document must be approved by the TB in order to ensure that subsequent stages of the procurement are not affected. The approval of the document can be delegated to the PMU. In cases of tenders with pre-qualification, in order to avoid delays, this date could the same as that appearing in column 12	This information is for internal use to PE	
15.	This column shall indicate the date when the PE expects to advertise for the tender or to start to issue tender documents to the shortlisted bidders in the case of a tender with pre-qualification.	08	10
16.	This column shall indicate the expected deadline for the submission and opening of the tenders. Statutory periods from the date of advertising to the submission of tenders are given in the Third Schedule of GN. 97. They are 45 days and 30 days for the international and national competitive bidding respectively.	09	12
17.	In this column, the PE shall indicate the deadline by which the evaluation of tenders must be completed to ensure that subsequent stages of the procurement are not affected..	This information is for internal use to PE	

18.	This column indicates the deadline by which the tender evaluation report must be approved by the TB. This shall also be the date for notifying the winner.	10- The successful bidder must immediately be informed after the approval of contract award is done by the TB	13
19-21	<i>These columns gives the details of the final actions towards formalization of the contract.</i>		
19.	In this column the amount of the contract award shall be inserted. In the planned row it is expected to insert the estimated (budgeted amount) of the particular tender. In the actual row PE shall insert the amount of the contract award approved by the TB	This information is for internal use to the PE. However PPRA shall obtain the award information on the Reports to be submitted on the implementation of each procurement	
20.	In this column the PE shall fill in the expected date for contract for contract award. For planning purposes this date shall be the determinant of the dates by which the preceding actions must be completed so that the award of contract is made by this date		
21.	In this column the PE shall fill in the expected date for signing of the contract.		

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S, WORKS AND NON-CONSULTANCY SERVICES - INTERNAL USE



BASIC DATA		Gen. Proc Notice Advert	PRE-QUALIFICATION				PRE-QUALIFICATION		BIDDING DOCUMENTS		Invitation for Bids and Evaluation				Contra	
Estimated Amount in '000 Tshs	Procurement Method		DOCUMENT		INVITATION		EVALUATION		Prep & Submission by PMU	Approval by TB	Invitation for Bidding		Bid Evaluation and approval of award		Contract Amount in Tshs. 000	Co A
			Preparation by PMU	Approval by TB	Invitation Date	Closing-Opening	Submission Eval Rpt	Approval by TB			Bid Invitation Date	Bid Closing-Opening	Submission on Bid Eval Rpt	Approval by TB		
4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	

PROCUREMENT PLAN FOR CONSULTANCY SERVICES - INTERNAL USE

Name of the Procuring Entity:

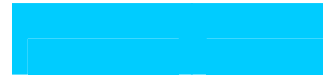
Financial Year:



Description*	Basic Data						Gen. Proc Notice Advert	Request for Expression of Intere			
	Tender No.	Lot Number	Estimated Amount in Tshs '000	Procurement Method	Selection Method	Contract Type		Invitation		Evaluati	
								Invitation Date	Closing-Opening	Submission Eval. Rpt	Api Shc
1	2	3	4	5	6	7	8	9	10	11	
Total Cost											

PROCUREMENT PLAN FOR CONSULTANCY SERVICES - SUBMISSION TO PPRA

Name of the Procuring Entity:



Financial Year:



Description*	Tender No.	Lot Number	Estimated Amount in Tshs '000	Procurement Method	Basic Data		Gen. Proc Notice Advert	Request for Expression of Interest			I
					Selection Method	Contract Type		Invitation Date	Closing-Opening	Notification Date	Invi I
1	2	3	4	5	6	7	8	9	10	11	
Total Cost											

PROCUREMENT PLAN FOR CONSULTANCY SERVICES - EXTERNAL USE

Name of the Procuring Entity: [Redacted]

Financial Year: [Redacted]

Description*	Basic Data					Request for Expression of Interest			Invitation of proposals and approval for award		
	Tender No.	Lot Number	Procurement Method	Selection Method	Contract Type	Invitation Date	Closing-Opening	Notification Date	Consultant Proposals		Notification Date
									Invitation Date	Submission/Opening Date	
1	2	3	4	5	6	7	8	9	10	11	12