

# EXPRO National Manual for Projects Management

## Volume 4, chapter 8

### Pre-Tender Meeting Procedure



Document No. EPM-KD0-PR-000007 Rev 004



## Pre-Tender Meeting Procedure

### Document Submittal History:

Revision:	Date:	Reason For Issue
000	31/10/2017	For Use
001	20/02/2018	For Use
002	04/02/2019	For Use
003	31/03/2019	For Use
004	11/08/2021	For Use



## Pre-Tender Meeting Procedure

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# Pre-Tender Meeting Procedure

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# Pre-Tender Meeting Procedure

## 1.0 PURPOSE

This procedure provides the guidance for the facilitation and scope of the Pre-Tender Meeting which is to be held with all Tenderers after issuance of the Tenders and prior to submission of Tenders to provide an opportunity for Tenderers to be afforded access to the Jobsite and raise initial clarifications relative to the ITT Documents.

That Meeting will be announced via ETIMAD Portal to afford an ease access for tenderers' and assure that all initial questions are set clear.

Pre-Tender meeting and site visits are provided in order to review the requirements of the Tender documents with Tenderers, solicit questions and encourage discussions to ensure to the maximum extent possible, that the Tenderers have a clear understanding of the requirements of the ITT Documents.

## 2.0 SCOPE

This procedure applies to Contract and Procurement activities conducted under the administration and management of the Contracts Management Department.

## 3.0 DEFINITIONS

Term	Definition
Agreement	Contract or Purchase Order (collectively "Agreement") between the Entity and a 2nd Party
Construction Contractor	The Main or Principal Contractor responsible for undertaking the Construction Works on the Project.
Entity	Government Entity, Authority or Ministry responsible for the Project(s)
EPMO	Entity Project Management Organization
HSSE	Health, Safety, Security and Environment
ITT	Invitation to Tender documents. Also referred to as Request for Proposal (RFP)
Jobsite	Place or location where the Works or Services will be performed sometimes referred to as the site or location of Works or Services.
Laws	Government Tenders and Procurement Law issued pursuant to Royal Decree No. (M/128) dated 13/11/1440 AH and the Implementing Regulations thereof issued pursuant to the Minister of Finance's Resolution No. (1242) dated 21/3/1441 AH and as amended thereafter.
Project	Project to be undertaken by an Entity that consists of single or multiple Agreements with 2nd Parties to perform Works or Services as part of the execution plan to deliver such a Project
Services	Provision of technical or consulting services for design, studies, investigations (geotechnical, surveying testing), specialist advice or the like that are not the Works but necessary to support them
Site Construction Department	Department within the Project Management Company that is responsible for Construction activities/operations.
Contracts Management Department	Department within the Entity Project Management Organization (EPMO) or at corporate level authorized to conduct contracts formation and administration activities.
Site Engineering Department	Department within the Project Management Company that is responsible for Engineering or design activities/operations.



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Tenderer	A company that has been prequalified and issued a specific tender document package for Works or Services.
Works	Construction or supply of goods, facilities or the like of permanent and temporary nature as contracted by the Entity

### 4.0 REFERENCES

NOT USED

### 5.0 ROLES & RESPONSIBILITIES

The Contracts Management Department remains accountable for the Pre-Tender Meeting relative to an ITT Document.

The following defines the individual roles and responsibilities for the preparation of the Pre-Tender Meeting and associated Meeting Minutes (**Attachment 2**):

Individual	Role
Construction Manager	Responsible for obtaining access to the Jobsite.
Contracts Management Department Manager	Responsible for the approval of Pre-Tender Meeting Minutes prior to issuance to the Tenderers
Contracts Specialist	Responsible for the arranging, scheduling, chairing and recording the minutes of the Pre-Tender Meeting and issuance of such to all attendees and those Tenderers who declined.
Engineering Management Department Representative	Provides briefing on the design, project overview and engineering deliverables / obligations required under the Agreement
Health, Safety, Security & Environmental Representative	Provides briefing on the HSSE plans and requirements for the project to the Tenderers.

Department Managers may delegate their responsibilities to assigned members of their Department provided such delegation is notified to the Contracts Management Department Manager and Contracts Specialist.

### 6.0 PROCESS

The following procedures define the requirements for the timing, attendance, and content of the Pre-Tender Meeting and resolution of any actions arising therefrom in relation to the Pre-Tender Meeting.

#### 6.1 Attendance

The Contracts Specialist shall invite attendees from the respective Departments to attend the Pre-Tender Meeting, at a minimum, Engineering, Construction, Project Controls and Health & Safety Representatives shall be in attendance and preferably, when available, the “evaluators”. All Tenderers shall be invited to send representatives, and the attendance should be limited to a maximum of four (4) attendees per Tenderer unless prior approval is obtained. Contracts Specialist coordinated with the respective departments for their input and prepares and issues a Pre-Tender Meeting Agenda (**Attachment 1**) to all the attendees.

Regardless of how critical the site condition in some cases, it is mandatory for Tenderers to attend the Pre-Tender Meeting if invited. Moreover, a Meeting Minutes shall be issued (**Attachment 2**) for consistency in communication of the ITT Documents.



### 6.2 Timing of Pre-Tender Meeting

The Contract Formation Specialist chairs the Pre-Tender Meeting with the attending representatives from the appropriate Departments.

Pre-Tender meetings should ideally be held in the first two (2) weeks of the Tender Process, providing at least one (1) week for Tenderers to have reviewed the ITT Documents and allowing sufficient time post meeting to resolve and address any actions arising from the meeting.

Pre-Tender meetings will normally be held at the Jobsite so that prospective Tenderers can evaluate site conditions to determine how these conditions may affect their Tenders and methods of work. Tenderers can then submit questions concerning the ITT.

### 6.3 Basis of Discussions

The Contracts Specialist will preface all discussions with a statement that only information confirmed by the minutes of the Pre-Tender meeting and written responses to the Tenderers' written questions can be relied upon by the Tenderer.

The Contracts Specialist will further state that any changes to the Tender Documents resulting from the meeting, or responses to the Tenderers, will be the subject of an addendum to the documents.

The Pre-Tender Meeting Minutes cannot be used to change the requirements of the Tender documents.

### 6.4 Review of ITT Documents

The Contracts Specialist shall, during the Pre-Tender Meeting, review the following sections of the ITT Documents:

1. The Instructions to Tenderers, with specific reference to the following areas as a minimum:
  - a) Notification of Intent to Tender
  - b) Method of Tendering, including subcontracts and requirements for submitting Tenders in association with other companies
  - c) Ownership, Examination, and Interpretation of Tender documents.
  - d) Number of Proposals submitted.
  - e) Signing of Tender.
  - f) Submission of Tender, including submittal of alternate Proposals, Tender price discount, and Tender Security
  - g) Electronic copy of Tender documents
  - h) Award of Contract
  - i) Q&A via ETIMAD
2. Form of Tender, including method of pricing the work and information to be submitted into the tender. All pages of the Form of Tender should be reviewed, with the following areas to be specifically highlighted:
  - a) Tender Letter to be completed by indicating full legal name of the Tenderer, the amount of the tender (in words and figures) including discount (if any) and the individual numbers of addenda issued during the Tender period.
  - b) Schedule of Prices and Quantities to be completed and arithmetically correct in all extensions and totals.
  - c) Public Works Classification requirements to be clarified.
  - d) Details of Fixed Rate calculations, where applicable, to be comprehensive.
  - e) Preliminary Contract Schedule to support all milestones as presented in Special Conditions.
  - f) Manpower Tabulation and Accommodation Tables to be compatible.
  - g) Employment and Training of Saudi Arabian Citizens' Guidelines to be explained.

The Originator shall review the following components of the ITT Documents:



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- The Scope of Work and the accompanying drawings and specifications will be reviewed and explained by the Originating Department and/or Construction Department representative(s) as applicable.

The Contracts Specialist will solicit the answer to any other questions related to the Tender Documents and Tender package and record such in the Minutes of the Pre-Tender Meeting.

Attendance and pertinent information is recorded by the Contracts Specialist who, after internal review, issues Meeting Minutes to all attendees.

### 6.5 Jobsite Visit

As part of the Pre-Tender Meeting, the Contracts Specialist and Construction Department or Originating Department's representative, as appropriate, will hold an orientation with appropriate location drawings to explain to Tenderers the relative position of the facilities and features to be seen on the tour of the worksite.

The following are examples of what may be described:

- Access routes to and from the work area
- Safety requirements and potential hazards
- Other existing construction roads
- Existing camps or the location of camps for the work under the Contract
- Location of laydown and storage areas if designated at that time
- Support Industry locations
- Location of survey stations, bore holes, test pits, etc.
- Connecting points for electrical power, water, compressed air, etc.,
- Location of features which could obstruct or affect the performance of the work under the Contract
- Location of other features of general information to Tenderers

The Administering Department representative shall arrange for transport to and from the Jobsite. Department shall also arrange to obtain the necessary passes and all necessary approvals and security clearances for all Jobsite visit attendees if required (i.e. in a restricted area).

The Contracts Specialist, meanwhile, shall ensure that all attendees to the site visit are made aware of, and possess, suitable Personal Protective Equipment (hard hat, safety shoes, eye protection and high visibility vest) prior to conducting the Jobsite visit.

Foreign Tenderers are responsible for obtaining any necessary visas for entry into the Kingdom of Saudi Arabia.

Tenderers are to be reminded that taking photographs is forbidden. Any Tenderer not conforming to this rule shall be reported to the Director of Supply Management Department.

### 6.6 Distribution of Minutes of Meeting

The Contracts Specialist shall prepare the Minutes of Meeting with input from the participating departments and submit to the Contracts Management Department Manager for review of the content and clarity of the minutes.

Upon approval of the Minutes of Meeting, the Contracts Specialist shall issue the Minutes to all the Tenderers who purchased the Tender Documents as a record of the discussions to maintain consistency in the distribution of information relative to the ITT Document.

### 6.7 Action Items Arising

The Contracts Specialist shall be responsible for the identification of any actions arising from the Meeting and collate necessary clarifications, and where necessary, any modifications to the ITT Document.

If an item relating to a clarification or discrepancy was raised relative to the ITT Documents, the Contracts Specialist shall resolve such action after the meeting by one of the two following actions:





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- a) Clarification Only – Shall be added to the Tenderer Question & Answer Register and issued to all Tenderers.
- b) Discrepancy or change in the ITT Content shall be added to the Question & Answer Register and reviewed by the Originator as a possible Addendum, the outcome of the review shall be issued to Tenderers as an Addendum, if it is required, to correct the ITT Documents.

The Contracts Specialist shall track and monitor all outstanding items to closure, and where delays are encountered, elevate outstanding matters to the Director of the Contracts Management Department for resolution with the Director of the responsible department so as not to delay receipt of Tenders by the Tender Opening Date.

### 7.0 ATTACHMENTS

1. EPM-KD0-TP-000014 - Pre-Tender Meeting Agenda Template
2. EPM-KD0-TP-000051 - Minutes of Meeting Template



## Pre-Tender Meeting Procedure

### Attachment 1 - EPM-KD0-TP-000014 - Pre-Tender Meeting Agenda Template

<b>Invitation to Tender Document No. [ ]</b> <b>[INSERT TITLE]</b>	
<b>Pre-Tender Meeting Agenda Template</b>	
<b>Date:</b>	<b>[INSERT DATE]</b>
<b>Time:</b>	<b>[INSERT TIME]</b>
<b>Location:</b>	<b>[INSERT LOCATION]</b>
<b>Recorded by:</b>	<b>[INSERT MINUTE TAKER]</b>
<b>Attendees: - See Attached Attendance Sheet</b>	
<b>1.0</b>	<b>Introduction:</b>  On behalf of the [Insert Entity], we welcome all Tenderers to the Pre-Tender meeting for the [INSERT CONTRACT PACKAGE] Invitation to Tender. Introduction of [Entity] participants: – Project Director - – Procurement Lead - – Sr. Contract Management Department Manager - – Engineering Manager - – Site Manager - <ul style="list-style-type: none"><li>• Role of Participants</li><li>• Phones to silent----</li><li>• Emergency exit----</li><li>• Following this meeting, there will be a site visit.</li></ul> <p>The purpose of the meeting is to review the requirements of the Tender Documents to ensure that all Tenderers have a clear understanding of all Tendering requirements in order that Tenderers may formulate and submit their tenders correctly. This meeting will also provide an opportunity to respond to any questions that Tenderers may have pertaining to the Invitation to Tender.</p> <p>Attendees are requested to sign the “Attendance Sheet”. The Meeting Minutes will be made available to all Tenderers. Tenderers are invited to make their own notes or recordings of this meeting, but the Entity will not be bound by such notes which are considered invalid for clarification purposes.</p>
<b>2.0</b>	<b>Point of Contact for Clarifications / Questions:</b> Tenderers are reminded that all correspondences and questions pertaining to this Invitation to Tender are to be addressed to: <b>[INSERT NAME]</b> <b>Contract Formation Specialist</b> No other employee of the Entity is authorized to explain or interpret the Tender Documents.



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	Any questions must be submitted in writing and both questions and answers will be transmitted to all Tenderers.
3.0	<b>Tender Bond:</b> Tenderers are reminded that their tenders must be accompanied by a Tender Bond to the value of not less than [SAR ], valid for a period of 180 days from the Tender Due Date of [ ]. Tenders submitted without a valid bid bond will be rejected (Refer to Instructions to Tenderers, Article titled "Tender Security").
4.0	<b>Addenda:</b> All changes to the Tender Documents will only be made via an Addendum. However, these Pre-Tender meeting minutes, and all questions and answers transmitted to Tenderers, are explanatory in nature and do not constitute an Addendum to the Invitation to Tender Documents.
5.0	<b>Tender Evaluation:</b> Tender evaluation shall consist of a two-stage process. First Stage: Opening and evaluation of Tenderers' Technical Proposal and preliminary commercial evaluation for potential short listing of most responsive tenders. Second Stage: Detailed Evaluation and Negotiations. Only Tenderers providing acceptable Technical Proposals will progress to the second stage opening or be shortlisted for commercial evaluation.
6.0	<b>Alternative Tenders:</b> Tenderers are advised to submit a base Tender in full compliance with the terms and conditions stated in the Invitation to Tender. Alternative Tenders that provide a technical and/or commercial advantage to the Entity may be submitted. However, they must be in the format detailed in the Instructions to Tenderers and must be clearly marked "ALTERNATIVE".
7.0	<b>Examination of Tender Documents:</b> Tenderers are advised that it is the sole responsibility of each Tenderer to familiarize itself with the entire Invitation to Tender. Failure on the part of the Tenderers to inform themselves is at their own risk and no redress shall be given for any errors or omissions.
8.0	<b>Tender Name:</b> Tenderers must notify the Entity and obtain permission in writing if they intend to submit a Tender in a name other than that to which the Invitation to Tender Documents were addressed. Failure to comply may result in rejection of the Tender.
9.0	<b>Technical Requirements:</b>
9.1	Engineering Overview of scope and review of technical requirements.
9.2	<u>Construction:</u> A. Access and work areas B. Facilities and utilities provided C. Permits required and permits furnished D. Job site work rules E. Site Visit
9.3	Health, Safety, Security, Environmental: (HSSE) A. Zero Accident Philosophy C. Job Hazard Analysis (JHA)



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	<p>D. Safe Task and Risk Reduction Talks (STARRT)</p> <p>E. Construction Environmental Control Plan (CECP)</p> <p>Specific items relating to Safety &amp; Protection of the environment are emphasized. Contractor shall be required to comply with and enforce strict construction safety program.</p> <p>Tenderers are referred to the Contract Safety &amp; Health requirements contained within the ITB, are urged to read and understand them, and request clarifications (in writing) if any aspect of the requirements is not understood.</p>
9.4	Key Personnel & Authorized Representatives
	Tenderers' attention is drawn to <b>Part 4, Form -</b> .
9.5	<p>QA Requirements (QA/QC):</p> <p>Tenderers' attention is drawn to the Quality Assurance Requirements of the Tender Documents.</p>
9.6	<p>Interfaces: (Construction)</p> <p>Tenderers are advised that they would be interfacing and coordinating with other Contractors at the Site.</p>
9.7	<p>Site Access &amp; Laydown Areas: (Construction)</p> <p>Tenderers entry points are discussed. Laydown Areas are explained.</p>
9.8	<p>Method Statement/Project Execution Plan:</p> <p>Tenderers attention is drawn to <b>Part 4, Form – Method Statement and Project Execution Plan</b>.</p>
9.9	<p>Schedule:</p> <p>Tenderers attention is drawn to the following key scheduling sections of the ITB namely:</p> <p><b>[INSERT ARTICLE NUMBER]</b>, which lists the Milestones that will be required to be met by the Contractor. Tenders must contain schedules that meet these milestones.</p> <p><b>[INSERT ARTICLE NUMBER]</b>. Tenderer's attention is drawn to the requirements for an initial 90 Day Schedule within 28 days of notice to proceed. This schedule will include significant detail on mobilization, therefore any effort expended in the development of the Tender Schedule will significantly assist the Tenderer's post NTP efforts.</p> <p>Part 4, <b>Form E – Tenderer's Schedule</b>, which describes how the proposed Contract Schedule should be developed and how it will be evaluated for completeness, appropriate level of detail, demonstration of knowledge of the Works, soundness of logic and durations and the overall critical path.</p>



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10.0	<b>Part 4 - Commercial Conditions &amp; Tender Forms (Contracts):</b> Tenderers are referred to Part 4 Commercial Conditions, of the Tender Document, for the requirement to complete and submit all forms identified in Part 4. In particular, attention is drawn to requirement for Tenderers to identify all exceptions/modifications/deviations etc.... Tenderers are advised that they are at liberty to add additional line items but only within the space expressly provided at the end of each section. Tenderers are not allowed to change the Unit of Measure shown against an item. Statements such as "To be advised", "Subject to Negotiations" etc. are not acceptable. Tenderers are reminded that technically non-responsive Tenders would <b>not</b> progress to the commercial Tender opening stage. Submittal of additional information between the Technical opening and Commercial opening is generally not permitted.
11.0	<b>Due Dates:</b> Tenders must be received as per instructions in the Tender Documents by <b>12.00 Noon on 20 .</b>
12.0.	<b>Questions: (Contracts)</b> Tenderers were invited to ask questions, and the following issues were responded to in the meeting. Tenderers were advised that written questions would be received and answered up to <b>[INSERT TIME AND DATE FOR LAST QUESTIONS]</b> i.e. a week before the Tender due date. No questions received after this date will be answered.
Q.	
A.	
Contract Management Dept.:	Date:_____
Engineering Management Dept.:	Date:_____
Construction Dept:	Date:_____
<b>ATTACHMENTS:</b>	





## Pre-Tender Meeting Procedure

<b><u>First Party</u></b>	<b><u>Second Party(s)</u></b>
Name:	Name:
Job Title	Job Title
Signature:	Signature:
<b>Meeting Minutes Distribution List: [Insert list other recipients other than the attendees]</b>	

SAMPLE