

CITY OF JOBURG PROPERTY COMPANY (SOC) LTD

BID PROPOSAL



BID NUMBER: POP 09/2020

POP 09/2020 - REQUEST FOR PROPOSALS TO BE INCLUDED IN THE JPC PANEL OF FINANCIAL TRANSACTION ADVISORS TO BE UTILISED ON AN AS AND WHEN REQUIRED FOR THREE YEARS FROM THE DATE OF APPOINTMENT ONTO THE PANEL

NAME OF BIDDER :

CSD NUMBER :

Please note: Do not remove the front page of this document. Keep in order as purchased.

**City of Joburg Property Company (SOC) Ltd
Department of Finance: Supply Chain Management Unit**

POP 09/2020

Note: Document Cost: R300.00 (non-refundable if you purchase a hardcopy from JPC offices) or tender document can be downloaded from E-tenders and JPC website at no cost, via

www.etenders.gov.za or www.jhbproperty.co.za

Important Notice

Document availability : 29th January 2020 at 12h00

Non - Compulsory briefing sessiion : 05th February 2020 at 12h00 at Braamfontein, 33 Hoofd Street, Braampark Office Park, Forum I, Ground Floor

No submission(s) transmitted by fax or other electronic means will be accepted

Closing time of submission: 28th February 2020 at 10h30 (Telkom time) at Braamfontein, 33 Hoofd Street, Forum II (Forum Two), First Floor – no bid received after the closing date and time will be accepted or considered

Opening of submissions: 10h30 – bids will be opened in public in the designated boardrooms at City of Joburg Property Company (SOC) Ltd, First Floor , Forum II (Forum two), Braampark Office Park, 33 Hoofd street, Braamfontein

POP 09/2020 - REQUEST FOR PROPOSALS TO BE INCLUDED IN THE JPC PANEL OF FINANCIAL TRANSACTION ADVISORS TO BE UTILISED ON AN AS AND WHEN REQUIRED FOR THREE YEARS FROM DATE OF APPOINTMENT ONTO THE PANEL

NAME OF BIDDER :

Documents to be Submitted: 1 original and 2 copies plus read-only disc containing the scanned version of the completed bid submission and all annexures/ supporting documents

Submissions under sealed cover must be addressed to City of Joburg Property Company (SOC) Ltd endorsed with bid number and description, and placed in the tender box no later than the date and time indicated below. City of Joburg Property Company (SOC) Ltd does not take any responsibility for any bids deposited into an incorrect box.

Closing Date: 28 February 2020

Closing Time: 10h30 (Telkom time)

**Place: City of Joburg Property Company (SOC) Ltd
First Floor, Forum II (Forum two)
Braampark Office Park
33 Hoofd Street, Braamfontein**

CONTENTS

INTRODUCTION.....	4
INVITATION TO BID (MBD1).....	5
TENDER ADVERT FOR BID: 01/2020 (JPC MBD 1).....	7
GENERAL TERMS OF REFERENCE PROCEDURES AND CONDITIONS (JPC MBD3).....	10
DECLARATION OF INTEREST (MBD 4)	12
PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017 (MBD 6.1).....	16
BIDDER'S INFORMATION (JPC MBD 7.1).....	21
DECLARATION OF BIDDERS PAST SUPPLY CHAIN MANAGEMENT PRACTICES (MBD 8)	22
CERTIFICATE OF INDEPENDENT BID DETERMINATION (MBD 9)	24
SCOPE OF WORK (JPC MBD 10)	27
BID SPECIFICATIONS (JPC MBD 11)	28
EVALUATION CRITERIA (JPC MBD 12)	30
STATEMENT OF BIDDERS EXPERIENCE (JPC MBD 13).....	35
STANDARD CONDITIONS OF SUBMISSION (JPC MBD 14).....	37
JPC STANDARD CONDITIONS OF APPOINTMENT (JPC MBD 15)	41
REGISTRATION DOCUMENTS (JPC MBD 16).....	44
BIDDER'S COMPANY PROFILE (JPC MBD 17)	45
POWER OF ATTORNEY OR COMPANY RESOLUTION (JPC MBD 18)	46
PROOF OF UP TO DATE MUNICIPAL ACCOUNT / AFFIDAVIT / PROOF OF ARRANGEMENTS TO SETTLE ARREARS (JPC MBD 19).....	47
JOINT VENTURE / CONSORTIUM AGREEMENT (JPC MBD 20).....	48
BIDDER'S EXPERIENCE (JPC MBD 21).....	49
RELEVANT EXPERIENCE AND QUALIFICATIONS OF THE KEY PERSONEL (JPC MBD 22).....	50
TRANSFORMATION AND EMPOWERMENT PLAN INCLUDING PROOF OF LOCATION JPC MBD 23.....	51

INTRODUCTION

The City of Johannesburg (CoJ)

- a) In 2000, Johannesburg was restructured to become a single metropolitan authority and elections were held for an executive mayor and unified local government.
- b) Since then, the City has enjoyed a financial turnaround, with the creation of a credible and stable operating environment. This stability, strong centralised co-ordination and oversight has allowed the City to play a crucial role in building the economy, and implementing policies and structures to support economic growth and poverty alleviation.
- c) All urban development in Joburg is guided by the Growth and Development Strategy.

The City of Joburg Property Company (JPC)

- a) The City of Joburg Property Company SOC Ltd (JPC), established in 2000, is a dynamic company mandated to manage and develop the City of Johannesburg's (CoJ) property assets for the purpose of maximising both social and commercial opportunities for the Council.
- b) Dedicated to finding solutions to the developmental challenges facing the City of Johannesburg, the JPC utilises council-owned land assets to leverage private sector investment in public infrastructure. The JPC, on behalf of the CoJ, provides Property Asset Management, Property Management (Commercial), Property Management (Social), as well as Facilities Management and Maintenance Services; and its relevant subsidiary services.
- c) Therefore the JPC prides itself as the arm responsible for maximising the social, economic and financial value of the CoJ's total property portfolio and enhancing its efficient use of property to drive investment, economic growth and job creation. The JPC aims to achieve its objectives by focusing on the following imperatives:
 - Realising value (social, financial and economic) for the CoJ;
 - Supporting economic development and aligning the CoJ property portfolio with CoJ priorities;
 - Increasing the effectiveness of economically viable municipalities and social use of properties; and
 - Management of risk and return with respect to the property portfolio and property transactions for the CoJ.

INVITATION TO BID

(MBD1)

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CITY OF JOBURG PROPERTY COMPANY SOC LTD					
BID NUMBER:	POP 09/2020	CLOSING DATE	28 February 2020	CLOSING TIME	10H30 (Telkom Time)
DESCRIPTION	POP 09/2020 - REQUEST FOR PROPOSALS TO BE INCLUDED IN THE JPC PANEL OF FINANCIAL TRANSACTION ADVISORS TO BE UTILISED ON AN AS AND WHEN REQUIRED BASIS FOR A PERIOD OF THREE YEARS FROM DATE OF APPOINTMENT ONTO THE PANEL				
THE SUCCESSFUL BIDDERS WILL BE INCLUDED IN JPC'S PANEL OF FINANCIAL TRANSACTION ADVISORS TO BE UTILISED ON AN AS AND WHEN REQUIRED BASIS FOR A PERIOD OF THREE YEARS FROM DATE OF APPOINTMENT					
BID RESPONSE DOCUMENTS MUST BE DEPOSITED IN THE BID BOX SITUATED AT 33 HOOFD STREET, FORUM II, FIRST FLOOR, BRAAM PARK, BRAAMFONTEIN, JOHANNESBURG. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS – (NOT TO BE RE-TYPED OR AMENDED)					
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
TAX COMPLIANCE STATUS	TCS PIN:		OR	CSD No:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE [TICK APPLICABLE BOX]	<input type="checkbox"/> Yes <input type="checkbox"/> No	B-BBEE STATUS LEVEL SWORN AFFIDAVIT		<input type="checkbox"/> Yes <input type="checkbox"/> No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]					
SIGNATURE OF BIDDER		DATE		
CAPACITY UNDER WHICH THIS BID IS SIGNED					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO:					
Municipal Entity: City of Joburg Property Company (SOC) Ltd. Contact Person : Supply Chain Management Unit Tel: 010 219 9000 Email: tenders@jhbproperty.co.za					

TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
<p>1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–OR DOWNLOADED ONLINE (NOT TO BE RE-TYPED)</p> <p>1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.</p> <p>2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 APPLICATION FOR THE TAX COMPLIANCE STATUS (TCS) CERTIFICATE OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 FOREIGN SUPPLIERS MUST COMPLETE THE PRE-AWARD QUESTIONNAIRE IN PART 3 BELOW.</p> <p>2.5 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.</p> <p>2.6 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.</p> <p>2.7 WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS
<p>3.1. IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.2. DOES THE ENTITY HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.3. DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.4. DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.5. IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.</p>

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

NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:.....

DATE:.....

TENDER ADVERT FOR BID: POP 09/2020

JPC MBD 1

CITY OF JOBURG PROPERTY COMPANY (SOC) LTD (REG. NO 2000/017147/07) ("JPC"), HEREBY INVITES INTERESTED PROFESSIONALS TO SUBMIT PROPOSALS TO BE INCLUDED IN JPC'S PANEL OF FINANCIAL TRANSACTION ADVISORS TO BE UTILISED ON AN AS AND WHEN REQUIRED BASIS FOR A PERIOD OF THREE YEARS FROM THE DATE OF APPOINTMENT ONTO THE PANEL

Bid Number	POP 09/2020
Bid Description	POP 09/2020 - Request For Proposals to be included in the JPC'S Panel of Financial Transaction Advisor to be utilised on an as and when required basis for three years from date of appointment on to the panel.
Non - Compulsory Briefing Session Date	A Non - Compulsory briefing session will be held on the 05 th February 2020 at 10:00, designated boardroom at , Forum I (One) Building, Ground Floor, Braampark Office Park, 33 Hoofd Street, Braamfontein, Johannesburg
Document Availability Date	12h00 on the 29 th January 2020
Document Cost	R 300.00 (non-refundable if you purchase a hard copy from JPC Offices) or tender document can be downloaded from E-tenders and JPC website at no cost, via www.etenders.gov.za or www.jhbproperty.co.za
Closing Date	28 th February 2020 at 10h30 (Telkom time)
Disqualification criteria	Non – Signature of the following documents: <ul style="list-style-type: none"> • Declaration of the Bidder's Past Supply Chain Practices in MBD 8 • Bid Submission in JPC MBD 7.1 • Certificate of Independent Bid Determination in MBD 9
Compliance Requirements before an award is made to the successful Bidder	<ul style="list-style-type: none"> • Tax Clearance Certificate, valid on the closing date of the bid, or exemption to pay taxes as issued by the South African Revenue Services (SARS) or Valid Tax Compliant Verification PIN number issued by SARS. • Proof of registration of the Bidder as follows: <ul style="list-style-type: none"> ○ Natural persons- certified copy of ID document/ passport ○ Partnership- copy of Partnership Agreement plus IDs of all partners ○ Company- current CM29 ○ Close Corporation- current copy of CK1 and/or CK2C ○ Trust- letter of appointment from the Master of the High Court of SA and deed of trust ○ JV/Consortium- JV/Consortium Agreement plus CIPC and/or ID documents of all JV/Consortium partners • Copy of Professional indemnity Insurance • Up to date Municipal Account not older than three (3) months and not over three (3) months in arrears for the individual / Proof

	<p>that acknowledgements or arrangements have been made to settle arrears / Affidavit stating why an up to date municipal account cannot be submitted.</p> <ul style="list-style-type: none"> • Up to date Municipal Account not older than three (3) months and not over three (3) months in arrears for the Entity / Proof that acknowledgements or arrangements have been made to settle arrears / Affidavit stating why an up to date municipal account cannot be submitted • Up to date Municipal Account not older than three (3) months and not over three (3) months in arrears for the Director (s) or Member (s) / Proof that acknowledgements or arrangements have been made to settle arrears / Affidavit stating why an up to date municipal account cannot be submitted • In the event the bidder is tendering as a Joint Venture/Consortium, all members of the JV/Consortium must submit all required documentation and a JV / Consortium agreement • Proof of Central Supplier Data Base registration (CSD) valid on tender closing date.
Evaluation Criteria	Functionality and BBBEE
Address	City of Joburg Property Company SOC Ltd, First Floor , Forum II (Two) Building, 33 Hoofd Street, Braampark Office Park, Braamfontein
Enquiries	tenders@jhbproperty.co.za

Please note the following conditions of submission:

- No late proposals will be considered. It is recommended that bids be submitted the day prior to the closing date as JPC will not approve any request for condonation of late submissions due to any unforeseeable reason resulting in such late submissions.
- City of Joburg Property Company (SOC) Ltd reserves the right not to accept any proposals/accept part of the proposals, or to withdraw the call for proposals.

Helen Botes
Chief Executive Officer
City of Joburg Property Company SOC Ltd
1st Floor, Forum II Building, Braam Park
Office Park, 33 Hoofd Street,
Braamfontein Johannesburg
www.jhbproperty.co.za

Contact Details
Supply Chain
Management
Department
Tel: (010) 219-9000
Fax: (010) 219-9400

BID DESCRIPTION: REQUEST FOR PROPOSALS TO BE INCLUDED IN THE JPC PANEL OF TRANSACTION FINANCIAL ADVISOR TO BE UTILISED ON AN AS AND WHEN REQUIRED BASIS FOR A PERIOD OF THREE YEARS FROM DATE OF APPOINTMENT ONTO THE PANEL

NON - COMPULSORY BRIEFING SESSION: AS PER PAGE 7 TO BE HELD IN IMBIZO ROOM, JPC'S OFFICES, GROUND FLOOR, FORUM I (ONE) BUILDING, BRAAMPARK, 33 HOOFD STREET, BRAAMFONTEIN.

BID DOCUMENTS CANNOT BE POSTED.

BID DOCUMENTS MUST BE PLACED IN A SEALED MARKED ENVELOPE AND DEPOSITED IN THE BID BOX SITUATED AT: JPC'S OFFICES SITUATED AT FORUM II BUILDING, FIRST FLOOR, BRAAMPARK OFFICE PARK, 33 HOOFD STREET, BRAAMFONTEIN.

BIDDERS SHOULD ENSURE THAT BIDS ARE DELIVERED TIMEOUSLY AT THE CORRECT ADDRESS.

INCOMPLETE, UNSIGNED DOCUMENTS/FORMS MAY BE REJECTED. JPC WILL NOT ACCEPT LATE RESPONSES.

ALL PAGES MUST BE INITIALLED.

ONE ORIGINAL OF THE DOCUMENT, PLUS TWO (2) COPIES PLUS A READ-ONLY DISK CONTAINING THE SCANNED VERSION OF THE TENDER SUBMISSION AND ALL ANNEXURES/ SUPPORTING DOCUMENTS MUST BE DELIVERED AND CLEARLY MARKED.

The bid box is accessible from Monday – Friday at 08H00 – 16h00.

ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS (NOT TO BE RE-TYPED).

THIS BID IS SUBJECT TO JPC'S STANDARD CONDITIONS OF APPOINTMENT (JPC MBD 15) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

GENERAL TERMS OF REFERENCE PROCEDURES AND CONDITIONS

JPC MBD3

1. Purpose

The purpose of this request is invite interested professionals to submit proposals to be included in the JPC's Panel of Financial Transaction Advisors, on an as and when required basis, on behalf of City of Joburg Property Company SOC Limited (JPC) for a period of 3 (three) years from the date of appointment onto the panel.

2. Conditions of Proposal

- 2.1 The City of Joburg Property Company (SOC) Ltd (Reg No 2000/017147/07) ("JPC"), hereby invites interested suitable qualified/experienced Bidders to submit proposals for consideration for the appointment for the work described in this POP.
- 2.2 Appointment will be made in accordance with JPC's standard conditions of contract
- 2.3 The appointment into the JPC's Panel of Financial Transaction Advisors does not guarantee that the consultant will received actual appointment for the project that are being implemented. JPC to run a competitive process within the established panel.

3. Submission of Proposals

- a. The Bidder(s) must submit one original and two (2) copies plus a read-only disk of the scanned version of the Proposal document submitted and all annexures/ supporting documents.
- b. Proposals must be submitted on or before 10:30 (Telkom Time) on the closing date.
- c. Each Proposal must be clearly marked with the title of the bid as per the cover page.
- d. The completed proposal call documents must be deposited in the box made available at the JPC Offices, First Floor, Forum II Building, Braampark Office Park, 33 Hoofd Street, Braamfontein.

BID DOCUMENTS CANNOT BE POSTED

BID DOCUMENTS MUST BE PLACED IN A SEALED MARKED ENVELOPE AND DEPOSITED IN THE BID BOX SITUATED AT: **JPC'S OFFICE, FIRST FLOOR, FORUM II BUILDING, BRAAMPARK OFFICE PARK, 33 HOOFD STREET, BRAAMFONTEIN.**

BIDDERS SHOULD ENSURE THAT BIDS ARE DELIVERED TIMEOUSLY TO THE CORRECT ADDRESS. BID SUBMITTED AFTER THE CLOSING DATE AND CLOSING TIME WILL NOT BE ACCEPTED FOR CONSIDERATION.

The bid box is accessible from 08:00 – 16:00 hours from Monday - Friday.

4. Further Conditions

- a. The Bidder(s) shall be deemed to have satisfied itself as to all of the conditions, procedures and performance and discharge of the obligations required in terms of this document.
- b. The Bidder(s) shall be deemed to know and understand the content of this document and

- a submission of a Proposal will indicate the Proposer(s) unconditional acceptance of all the terms and conditions contained in this document.
- c. The information required in the Proposal must be provided accurately and honestly. Bidder(s), who fail to provide such information to the satisfaction of the JPC, will be disqualified from the proposal call process.
 - d. All details provided by the Bidder(s) will be regarded as material representations, on the basis of which the JPC based the evaluation of the proposal. Any misrepresentation will be treated as material and will, result in the disqualification of the specific proposal by JPC and/or termination of the subsequent appointment.
 - e. JPC will not be held responsible or liable for any costs whatsoever and /or losses incurred or suffered by the Bidder(s) or any other party or parties for whatsoever reason as a result of the Proposal.
 - f. Neither the appointed Bidder(s) nor the resulting contract may be ceded or assigned to a third party unless the Bidder(s) state that he/she/it is acting as agent on behalf of a another person or entity or such cession or assignment is approved by JPC for justifiable reasons.
 - g. The evaluation of bids will be completed by the JPC.
 - h. JPC reserves the right to seek clarification or further information from Bidders and or to the request the submission of required documents within a specified time, and to appoint professionals to advise on aspects of the proposals submitted.
 - i. JPC reserve the right to make an appointment to more than one bidder, in whole or in part.
 - j. JPC reserve the right to negotiate a final proposal with any of the Bidder(s).
 - k. JPC does not bind itself to accept any proposal submitted.
 - l. JPC may at its discretion withdraw the proposal call process at any stage during the process.

Enquiries

Only email enquiries will be accepted, such enquiries must be directed to:
tenders@jhbproperty.co.za

POSTAL ADDRESS

STREET ADDRESS

TELEPHONE NUMBER CODE NUMBER

CELLPHONE NUMBER CODE NUMBER

FACSIMILE NUMBER CODE NUMBER

E-MAIL ADDRESS

SIGNATURE OF BIDDER

DATE

CAPACITY UNDER WHICH THIS BID IS SIGNED.....

DECLARATION OF INTEREST

(MBD 4)

1. No bid will be accepted from persons in the service of the state¹.
2. Any person, having a kinship with persons in the service of the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid. In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons connected with or related to persons in service of the state, it is required that the bidder or their authorised representative declare their position in relation to the evaluating/adjudicating authority.
3. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

No.	Information	Please provide detail	
3.1	Full name of bidder or his or her representative		
3.2	Identity number		
3.3	Position occupied in the company (director, trustee, shareholder ²)		
3.4	Company registration number		
3.5	Tax reference number		
3.6	VAT registration number		
Note	<i>(The names of all directors / trustees / shareholders members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.)</i>		
3.7	Are you presently in the service of the state?	Yes	No
	If yes, please furnish particulars :		
3.7.1	Name of director		

No.	Information	Please provide detail	
3.7.2	Service of state organization		
3.8	Have you been in the service of the state for the past twelve months? If yes, please furnish particulars :	Yes	No
3.8.1	Name of director		
3.8.2	Service of state organization		
3.9	Do you have any relationship (family, friend, other) with persons in the service of the state and who may be involved with the evaluation and or adjudication of this bid? If yes, please furnish particulars :	Yes	No
3.9.1	Name of person in the service of state		
3.9.2	Relationship		
3.10	Are you, aware of any relationship (family, friend, other) between any other bidder and any persons in the service of the state who may be involved with the evaluation and or adjudication of this bid? If yes, please furnish particulars :	Yes	No
3.10.1	Name of person in the service of state		
3.10.2	Relationship		
3.11	Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state? If yes, please furnish particulars :	Yes	No
3.11.1	Name of director		
3.11.2	Service of state organization		

No.	Information	Please provide detail	
3.12	Is any spouse, child or parent of the company's director trustees, managers, principle shareholders or stakeholders in service of the state? If yes, please furnish particulars:	Yes	No
3.12.1	Name of director		
3.12.2	Name of relative		
3.12.3	Relationship		
3.13	Do you or any of the directors, trustees, managers, principle shareholders, or stakeholders of this company have any interest in any other related companies or business whether or not they are bidding for this contract? If yes, please furnish particulars:	Yes	No
3.13.1	Name of director		
3.13.2	Related company		
Note:	<p>SCM Regulations:</p> <p>"In the service of the state" means to be –</p> <ul style="list-style-type: none"> (a) a member of – <ul style="list-style-type: none"> (i) any municipal council; (ii) any provincial legislature; or (iii) the national Assembly or the national Council of provinces; (b) a member of the board of directors of any municipal entity; (c) an official of any municipality or municipal entity; (d) an employee of any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No.1 of 1999); (e) a member of the accounting authority of any national or provincial public entity; or (f) an employee of Parliament or a provincial legislature. <p>"Shareholder" means a person who owns shares in the company and is actively involved in the management of the company or business and exercises control over the company.</p>		

4. Full details of directors / trustees / members / shareholders

Full Name	Identity Number	State Employee Number

5. I, the undersigned certify that the information furnished on this declaration form is correct.

I accept that the state may act against me should this declaration prove to be false.	
NAME OF REPRESENTATIVE	AUTHORIZED SIGNATURE (UNDERSIGNED)
DATE	CAPACITY

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017 (MBD 6.1)

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to this bid:

- The 90/10 system for requirements with a Rand value of above R50 000 000 (all applicable taxes included).

1.2

- a) The value of this bid could not be determined, therefore the highest acceptable tender will be used to determine the applicable preference point system; or
- b) The 90/10 preference point system will be applicable to this tender.

1.3 Points for this bid shall be awarded for:

- (a) Financial Offer; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
FINANCIAL OFFER	90
B-BBEE STATUS LEVEL OF CONTRIBUTOR	10
TOTAL POINTS FOR FINANCIAL OFFER AND B-BBEE MUST NOT EXCEED	100

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

2. DEFINITIONS

- (a) **“B-BBEE”** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (b) **“B-BBEE status level of contributor”** means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (c) **“bid”** means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (d) **“Broad-Based Black Economic Empowerment Act”** means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (e) **“EME”** means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (f) **“functionality”** means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (g) **“prices”** includes all applicable taxes less all unconditional discounts;
- (h) **“proof of B-BBEE status level of contributor”** means:
 - 1) B-BBEE Status level certificate issued by an authorized body or person;
 - 2) A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
 - 3) Any other requirement prescribed in terms of the B-BBEE Act;
- (i) **“QSE”** means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (j) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

3. POINTS AWARDED FOR FINANCIAL OFFER

3.1 THE 90/10 PREFERENCE POINT SYSTEMS

A maximum of 90 points is allocated for financial offer on the following basis:

90/10

$$P_s = 90 \left(1 - \frac{P_{max} - P_t}{P_{max}} \right)$$

Where

Ps = Points scored for financial offer of bid under consideration

Pt = Financial Offer of bid under consideration

Pmax = Financial Offer of highest acceptable bid

4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR

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

Price	90
B-BBEE Status Level of Contribution	Number of Points 10
1	10
2	09
3	08
4	05
5	04
6	03
7	02
8	01
Non - Contributor	0
Maximum	10
Total	100

5. BID DECLARATION

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

6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1

- 6.1 B-BBEE Status Level of Contributor: . =(maximum of 10 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

7. SUB-CONTRACTING

- 7.1 Will any portion of the contract be sub-contracted?

(**Tick applicable box**)

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

- 7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.....%

- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

- v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at least 51% owned by:	EME √	QSE √
Black people (As defined by the Act B-BBEE Number 46 of 2013 and any amended)		

8. DECLARATION WITH REGARD TO COMPANY/FIRM

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

8.4 TYPE OF COMPANY/ FIRM

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

[TICK APPLICABLE BOX]

8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES

.....

.....

.....

.....

8.6 COMPANY CLASSIFICATION

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

[TICK APPLICABLE BOX]

8.7 MUNICIPAL INFORMATION

Municipality where business is situated:

Registered Account Number:

Stand Number:.....

8.8 Total number of years the company/firm has been in business:.....

8.9 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBEE status level of contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
 - (a) disqualify the person from the bidding process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution.

WITNESSES

1.

2.

.....
SIGNATURE(S) OF BIDDERS(S)

DATE:

ADDRESS

.....

BIDDER'S INFORMATION

(JPC MBD 7.1)

Name of Bidder			
ID /Passport/ Registration Number			
Nature of bidder (tick one)	Natural Person/ Sole Proprietor		
	School/NGO/Trust		
	Company/ CC/ Partnership		
	Joint Venture (JV)		
Postal Address		Tel	
		Cell	
		Email	
		Fax	
BIDDER BANKING DETAILS			
Name of bidder's Banker			
Contact details of banker			

Please indicate how you became aware of the invitation to submit this Proposal			
The Star		JPC Web site	
Sowetan		E- Tenders	
JPC Social Media Accounts		JPC notice board	

I, the undersigned certify that the information furnished on this declaration form is correct.

I accept that the state may act against me should this declaration prove to be false.	
NAME OF REPRESENTATIVE	AUTHORIZED SIGNATURE (UNDERSIGNED)
DATE	CAPACITY

DECLARATION OF BIDDERS PAST SUPPLY CHAIN MANAGEMENT PRACTICES (MBD 8)

1. This municipal bidding document must form part of all bids invited.
2. It serves as a declaration to be used by municipalities and municipal entities in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
3. The bid of any bidder may be rejected if that bidder, or any of its directors have:
 - 3.1. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - 3.2. been convicted for fraud or corruption during the past five years;
 - 3.3. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - 3.4. been listed in the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No. 12 of 2004).
4. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this database were informed in writing of this restriction by the accounting officer / authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied). The Database of Restricted Suppliers now resides on the National Treasury's website www.treasury.gov.za and can be accessed by clicking on its link at the bottom of the home page	Yes	No
4.1.1	If so, furnish particulars:		

Item	Question	Yes	No
4.2	Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No. 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website www.treasury.gov.za by clicking on its link at the bottom of the home page.	Yes	No
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court of law outside the Republic of South Africa) for fraud or corruption during the past five years?	Yes	No
4.3.1	If so, furnish particulars:		

I, the undersigned certify that the information furnished on this declaration form is correct.

I accept that the state may act against me should this declaration prove to be false.	
NAME OF REPRESENTATIVE	AUTHORIZED SIGNATURE (UNDERSIGNED)
DATE	CAPACITY

CERTIFICATE OF INDEPENDENT BID DETERMINATION

(MBD 9)

1. This municipal bidding document (MBD) must form part of all bids¹ invited.
2. Section 4(1)(b)(iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
3. Municipal Supply Regulation 38(1) prescribes that a supply chain management policy must provide measures for the combating of abuse of the supply chain management system, and must enable the accounting officer, among others, to:
 - 3.1. take all reasonable steps to prevent such abuse;
 - 3.2. reject the bid of any bidder if that bidder or any of its directors has abused the supply chain management system of the municipality or municipal entity or has committed any improper conduct in relation to such system; and
 - 3.3. cancel a contract awarded to a person if the person committed any corrupt or fraudulent act during the bidding process or the execution of the contract.
4. This MBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid rigging.
5. In order to give effect to the above, the attached Certificate of Bid Determination (MBD 9) must be completed and submitted with the bid.

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Municipality / Municipal Entity)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no

consultation, communication, agreement or arrangement with any competitor regarding:

- (a) prices;
- (b) geographical area where product or service will be rendered (market allocation)
- (c) methods, factors or formulas used to calculate prices;
- (d) the intention or decision to submit or not to submit, a bid;
- (e) the submission of a bid which does not meet the specifications and conditions of the bid;
or
- (f) bidding with the intention not to win the bid.

8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

.....

Signature

.....

Date

.....

Position

.....

Name of Bidder

SCOPE OF WORK

(JPC MBD 10)

The details on the nature of the services are on the Bid Specifications **(JPC MBD 11)**. Below are key aspects / areas of services to be provided by the selected bidders on an as and when required basis.

The scope includes but not limited to:

- Transaction planning, feasibility analysis and institutionalisation
- Financial modeling on Property Investment and Outdoor advertising projects.
- Public – Private Partnership structuring in relation to property transactions.
- Investigate or develop sound funding proposals and commercially viable property development plan
- Due diligence processes
- Other related financial advisory support for large projects and provides diverse advisory support for

BID SPECIFICATIONS

(JPC MBD 11)

1. The Panel will be effective from the date of award onto the JPC Panel of Transaction Financial Advisors and will be valid for 3 years.
2. Submissions made by Bidders will be vetted through a compliance process to determine if the information provided in the bid submission is complete and correct and thereafter evaluated for capacity and capability to render services for as an when required.

NB :

- Bidders herein consent to any investigation JPC deems necessary in validating submission made;
 - The bidder will be removed from the panel if the required professional registration is not maintained , or for any other reason that caused the bidder to become ineligible after having been appointed;
3. The appointment into the JPC's Panel of Financial Transaction Advisors does not guarantee that the consultant will received actual appointment for the project that are being implemented. JPC to run a competitive process within the established panel.
 4. Professionals will be sourced as and when required from the Panel of Financial Transaction Advisors in terms of JPC's SCM Policy and guidelines.

5. Utilization of the panel

- a. The appointment into the JPC's Panel of Financial Transaction Advisors does not guarantee that the consultant will received actual appointment for the project that are being implemented. JPC to run a competitive process within the established panel.
- b. Services will be sourced on an as and when required basis from the Panel of Financial Transaction Advisors and in terms of JPC SCM Policy and guidelines.
- c. Requests for quotations will be advertised on the JPC notice boards and website. The notices will remain on the JPC notice boards and website for seven days.
- d. It is the responsibility of the Financial Transaction Advisors Firm to ensure that they check the JPC notice boards and website regularly and respond to JPC's requests for quotations as set out herein.
- e. It is important to note that no officials from JPC will contact any Financial Transaction Advisors firm for the purpose of obtaining quotes outside of the above process.
- f. Multi-year appointments will be dependent on performance and budget availability
- g. Bidders must ensure that they have adequate resources to undertake the work under stringent timeframes
- h. JPC reserves the right to ask tenderers to replace any member/s of the bidder's team if they don't meet the JPC requirements.
- i. JPC reserves the right not to make any appointment for this Panel of Financial Transaction

Advisors.

6. The successful Bidders appointed to the panel will be required to perform, *inter alia*, the following key deliverables, the list is not exhaustive, on an as and when required basis:

- Transaction planning, feasibility analysis and institutionalisation
- Financial modeling on Property Investment and Outdoor advertising projects.
- Public – Private Partnership structuring in relation to property transactions.
- Investigate or develop sound funding proposals and commercially viable property development plan
- Due diligence processes
- Other related financial advisory support for large projects and provides diverse advisory support for smaller projects

7. Prior to any work being awarded to the Service Provider, the following will apply:

- 7.1.1. The Service Provider's tax affairs to be in order at all times and validity to be verified prior to engagements of each and every task/assignment/work to be given;
- 7.1.2. Should the Service Provider's tax affairs not be in order during the engagement for the task/work/assignment work will be given to another service provider in that same category/discipline whose tax affairs are in order;
- 7.1.3. The Service Provider to submit proof of valid Professional Indemnity Insurance every time they submit proposals to JPC; and
- 7.1.4. The Service Provider to submit proof of valid registration with the relevant Association or Professional Bodies every time they submit proposals to JPC (where applicable).

EVALUATION CRITERIA

(JPC MBD 12)

Bids will be evaluated as follows:

1. COMPLIANCE CRITERIA BEFORE BID WILL BE EVALUATED FOR TECHNICALITY/FUNCTIONALITY (FAILURE TO PROVIDE THE FOLLOWING UPON SUBMISSION OF THE TENDER WILL RESULT IN YOUR BID BEING DISQUALIFIED)

- 1.1. Non-Signature of the declaration of the MBD 8 (Bidder's Past Supply Chain Practices) and JPC MBD 7.1 (Bid Submission) and 9 (Certificate of Independent Bid Determination).

2. COMPLIANCE CRITERIA BEFORE AN AWARD IS MADE TO THE SUCCESSFUL BIDDER

- 2.1. Tax Clearance Certificate, valid on the closing date of the bid, or exemption to pay taxes as issued by the South African Revenue Services (SARS) or Valid Tax Compliant Verification PIN number issued by SARS.
- 2.2. Proof of registration of the Bidder as follows:
 - a) Natural persons- certified copy of ID document/ passport
 - b) Partnership- copy of Partnership Agreement plus IDs of all partners
 - c) Company- current CM29
 - d) Close Corporation- current copy of CK1 and/or CK2C
 - e) Trust- letter of appointment from the Master of the High Court of SA and deed of trust
 - f) Proof of registration of NPO or NGO (Copy of Provincial Registration Certificate etc.)
 - g) JV/Consortium Agreement plus CIPC and/or ID documents of all JV/Consortium partners
- 2.3. Proof of professional indemnity Insurance
- 2.4. Up to date Municipal Account not older than three (3) months and not over three (3) months in arrears for the individual / Proof that acknowledgements or arrangements have been made to settle arrears / Affidavit stating why an up to date municipal account cannot be submitted.
- 2.5. Up to date Municipal Account not older than three (3) months and not over three (3) months in arrears for the Entity / Proof that acknowledgements or arrangements have been made to settle arrears / Affidavit stating why an up to date municipal account cannot be submitted.
- 2.6. Up to date Municipal Account not older than three (3) months and not over three (3) months in arrears for the Director (s) or Member (s) / Proof that acknowledgements or arrangements have been made to settle arrears / Affidavit stating why an up to date municipal account cannot be submitted.
- 2.7. Proof of Central Supplier Data Base registration valid on date of tender closing
- 2.8. In the event the bidder is tendering as a Joint Venture/Consortium, all members of the JV/Consortium must submit all required documentation and a JV / Consortium agreement

3. EVALUATION CRITERIA

TECHNICALITY / FUNCTIONALITY EVALUATION

Bids will be evaluated in order to establish whether they meet the minimum required thresholds for functionality. In this regard, bidders are required to achieve a functional score of not less than 70 points out of 100.

FUNCTIONALITY	WEIGHT
<p>Demonstrate company experience and references (signed letters of reference from clients which has the project name, project location, date of completion, value of project, client's contact details (physical address, land line and email address to be attached) – MAXIMUM WEIGHT = 40 POINTS</p> <p>COMPANY EXPERIENCE AND REFERENCES (MAXIMUM WEIGHT = 20 POINTS)</p> <p>Points will be scored on the following basis:</p> <ul style="list-style-type: none"> • Provide more than 10 signed letters of reference of completed projects of Transaction Advice since inception of the firm = 20 points • Provide between 8 and 9 signed letters of reference of completed projects of Transaction Advice since inception of the firm = 16 points • Provide between 6 and 7 signed letters of reference of completed projects of Transaction Advice since inception of the firm = 8 points • Provide between 5 and 3 signed letters of reference of completed projects of Transaction Advice since inception of the firm = 4 points • Provide 2 signed letters of reference of completed projects of Transaction Advice since inception of the firm = 2 points • Provide no letters of reference or incomplete letters of reference or letters which do not indicate completed work of Transaction Advice = 0 points <p>NB : BIDDER TO ATTACH SIGNED LETTERS OF REFERENCE FROM CLIENT ON CLIENT'S LETTER HEAD AND SHOULD REFLECT NAME OF PROJECT, PROJECT DURATION (START AND COMPLETION DATE, VALUE OF PROJECT, CLIENTS COMMENTS ON BIDDER'S PERFORMANCE ON THE PROJECT, CLIENT REPRESENTATIVE (RESPONSIBLE FOR THE PROJECT), CLIENT'S EMAIL ADDRESS AND CONTACT DETAILS.</p> <p>TOTAL VALUE OF PAST PROJECTS COMPLETED BY THE BIDDING ENTITY (MAXIMUM WEIGHT = 10 POINTS) SINCE INCEPTION OF THE FINANCIAL TRANSACTION ADVISORY FIRM</p> <p>Points will be scored on the following basis:</p> <ul style="list-style-type: none"> • R5 Billion and above = 10 points • R2 billion to below R5 billion = 8 points • R500 million to below R2 billion = 6 points • R200 million to below R500 million = 4 points • Below R200 million = 2 points 	<p>40</p>

<p>NB : ABOVE MENTIONED SIGNED LETTERS OF REFERENCE WILL BE UTILISED AS EVIDENCE FOR THE TOTAL VALUE OF PROJECTS COMPLETED BY BIDDING ENTITY ON MBD 13</p> <p>NUMBER OF PREVIOUSLY COMPLETED PROJECTS OF FINANCIAL TRANSACTION ADVISORY BY THE BIDDING ENTITY(MAXIMUM WEIGHT = 10 POINTS)</p> <p>Points will be scored on the following basis</p> <ul style="list-style-type: none"> • More than 10 completed projects of Financial Transaction Advisory services completed since inception of the firm = 10 points • 7 to 9 completed projects of Transaction Advisory services since inception of the firm = 7 points • 4 to 6 completed projects of Transaction Advisory services since inception of the firm = 4 points • 1 to 3 completed projects of Transaction Advisory services since inception of the firm = 1 points • 0 completed projects of Financial Transaction Advisory services = 0 points <p>BIDDERS TO ATTACH SIGNED LETTERS OF REFERENCE. FAILURE TO SUBMIT SIGNED LETTERS OF REFERENCE WILL RESULT IN BIDDER BEING SCORED 0 POINTS</p>	
<p>Relevant experience and Qualifications of the 5 Key Personnel and 5 will be (Maximum 40 points)</p> <p>Points to be scored on the following basis</p> <p>QUALIFICATIONS OF THE 5 KEY PERSONNEL (10 POINTS MAXIMUM)</p> <p>Qualifications in Transaction Advice</p> <p>BCom Hons /Masters or BCom investment and financial analysis or BCom (Commerce) or BAcc (Accounting) or BProc / LLB (Law) or BSc Honors (Quantity Surveying)</p> <p>= (10 points , 2 points each key personnel)</p> <p>NB : BIDDER TO ATTACH CERTIFIED COPIES OF THE QUALIFICATIONS. FAILURE TO ATTACH CERTIFIED COPIES WILL RESULT IN BIDDER BEING SCORED 0 POINTS</p> <p>ACCREDITED REGISTRATION WITH THE PROFESSIONAL BODIES = (10 POINTS MAXIMUM)</p> <p>Professional Registered Personnel:</p> <ul style="list-style-type: none"> • CFA • CMA 	<p>40</p>

<ul style="list-style-type: none"> • CA (SA) • Admitted Attorney or Advocate • PrQS <ul style="list-style-type: none"> • If 5 or more of the key personnel are professionally registered = 10 points • 4 professionally registered personnel = 7 points • 3 professionally registered personnel = 5 points • 2 professionally registered personnel and below = 2 points <p>NB : BIDDER TO ATTACH CERTIFIED COPIES OF THE VALID PROOF OF REGISTRATION AND AFFIDAVIT CONFIRMING THAT THE KEY PERSONNEL ARE INDEED EMPLOYED BY BIDDER</p> <p>OR</p> <p>THEY ARE INDEPENDENT CONSULTANTS TO THE BIDDING ENTITY ALLOCATED WORK AS AND WHEN ASSIGNMENTS ARE ALLOCATED TO THE BIDDING ENTITY, SUCH FULL TIME APPOINTMENT/ ARRANGEMENT WITH INDEPENDENT CONSULTANT TO THE BIDDING ENTITY SHOULD EXIST AS OF THE DATE OF TENDER CLOSING. FAILURE TO ATTACH THE ABOVE REQUESTED DOCUMENTATION WILL RESULT IN BIDDER BEING SCORED 0 POINTS</p> <p>CUMULATIVE EXPERIENCE OF THE KEY PERSONNEL (10 POINTS)</p> <ul style="list-style-type: none"> • 30 years and above = 10 points • 20 years to below 30 years = 6 points • 10 years to below 20 years = 4 points • Below 10 years = 2 points <p>NB: BIDDER TO ATTACH COPIES OF CV'S OF THE KEY PERSONNEL AS RECORDED ON THE BID DOCUMENT. FAILURE TO ATTACH WILL RESULT IN BIDDER BEING SCORED 0 POINTS</p> <p>CUMULATIVE VALUE OF PAST PROJECTS COMPLETED BY THE 5 KEY PERSONNEL (MAXIMUM WEIGHT = 10 POINTS)</p> <p>Points will be scored on the following basis:</p> <ul style="list-style-type: none"> • R4 Billion and above = 10 points • R2 Billion to below R4 billion = 7 points • R1 Billion to below R2 Billion = 4 points • R500 Million to R1 Billion = 2 points • Below R500 million = 1 point <p>CV'S (INCLUDING CERTIFIED COPIES OF QUALIFICATIONS) AND SIGNED LETTERS OF REFERENCE RELATING TO THE KEY PERSONNEL TO BE SUBMITTED TO SUBSTANTIATE ALL ACHIEVABLES RECORDED ON THE BID DOCUMENT. FAILURE TO SUBMIT THE EVIDENCE AS STIPULATED ABOVE WILL RESULT IN BIDDER BEING SCORED 0 POINTS</p>	
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<p>Transformation and empowerment plan with the organisation</p> <p>The Bidder is required to submit an Empowerment and Transformation Plan indicating the following:</p> <ul style="list-style-type: none"> - The Bidder's current Empowerment Plan and Initiatives (10) <ul style="list-style-type: none"> • 3 or more interns employed in the listed Professions = 10 points • 2 interns employed in the listed Professions = 6 points <p>NB : FAILURE TO SUBMIT A DETAILED EMPOWERMENT PLAN WILL RESULT IN BIDDER BEING SCORED 0 POINTS</p> <ul style="list-style-type: none"> - Locality of operational office (10) <ul style="list-style-type: none"> - Within City of Johannesburg Metropolitan Municipality= 10 points - Gauteng province = 5 points - Outside Gauteng = 0 points <p>NB : BIDDER SHALL ATTACH PROOF OF EXISTENCE OF AN OFFICE LOCATION SUCH AS INVOICES FOR MUNICIPAL RATES OR SIGNED LEASE AGREEMENT WITH THE LANDLORD. FAILURE TO ATTACH ANY OF THE TWO DOCUMENTS WILL LEAD TO A CONCLUSION THAT THE BIDDER DOES NOT HAVE ANY OFFICE WITHIN THE 2 ABOVE MENTIONED LOCATIONS.</p>	<p>20</p>
<p>TOTAL</p>	<p>100</p>

STATEMENT OF BIDDERS EXPERIENCE

(JPC MBD 13)

NAME OF BIDDER:
 BID NO.:

The Value of relevant Quantity Surveying work previously completed by the bidder is as follows:

	RELEVANT PROJECT/ PROGRAM NAME	VALUE OF WORK COMPLETED	PROJECT/PROGRAM OWNER	CONTACT DETAILS OF REFERENCE
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
	TOTAL			

CAPABILITY AND EXPERIENCE OF KEY PERSONNEL

The following Key Personnel will be allocated to the work:

	NAME	ROLE	CV ATTACHED
1.			
2.			
3.			
4.			
5.			
6.			

NB: CVs of nominated personnel with Certified copies of qualifications must be attached substantiating, capability, qualification, experience and suitability.

The following conditions apply to all bids submitted:

- All bids must be submitted in compliance with the Bid Specification specified in JPC MBD 11

QUALIFICATION CRITERIA

Failure to adhere to the qualification requirements on JPC MBD 1 (qualification criteria) will result in the disqualification of the bid:

SUBMISSION OF PROPOSALS

- Bidder(s) are invited to submit their Proposals by completing the returnable Municipal Bidding Documents (MBDs) and JPCs' MBDs contained in this document.
- In this regard:
 - No other form of Proposal will be accepted. The MBDs must not be construed as an offer.
 - The Bidder(s) must submit one (1) original and two (2) copies plus read-only disk containing scanned version of the completed Bid document including all annexures/ supporting documents
 - All Proposal documentation received shall be deemed JPC property and shall not be returned or thus requested back by any Bidder.
- Proposals must be sealed, clearly marked with POP name and number, and addressed to The Chief Executive Officer, City of Joburg Property Company (SOC) Ltd
- Bidder's return address must be clearly indicated at the back of the envelope.
- The fully completed document with annexures must be submitted before the closing date specified on the front cover, and be deposited in the tender box made available by the Client Services Centre of:

The City of Joburg Property Company (SOC) Ltd
Forum II Building, Braampark, 1st Floor
33 Hoofd Street, Braamfontein

- **PROPOSALS WHICH ARE NOT SUBMITTED IN A PROPERLY SEALED AND MARKED ENVELOPE AND DEPOSITED IN THE BOX BEFORE THE CLOSING DATE, WILL NOT BE OPENED.**
- **PROPOSALS WHICH ARE NOT SUBMITTED IN THE CORRECT FORMAT WITH ANNEXURES ATTACHED, DULY COMPLETED, INITIALLED AND SIGNED, WILL NOT BE CONSIDERED.**
- The information required in the MBDs must be provided accurately and honestly. All details provided by the Bidder(s) will be regarded as material representations, which the JPC base the evaluation of the Proposal on. Any misrepresentation will be treated as material and will result

in the disqualification of the Proposal by the JPC. Bidders, who fail to provide such information to the satisfaction of the JPC, will be disqualified.

OPENING OF PROPOSALS

- Proposals will be opened immediately after the closing time on the closing date at the offices of JPC at the mentioned address. The POP number, and the name of each Bidder(s) will be announced and recorded in a register.
- Bidder's return address must be clearly stipulated or indicated on the back of the envelope.

EVALUATION OF PROPOSALS

- JPC reserves the right to seek clarification or further information from Bidder(s) and to appoint professionals to advise and verify information on aspects of the Proposals submitted in a manner that the JPC or its agent deems appropriate.
- The preferred Bidder(s) may be required to make presentations to the JPC.
- The Bidder(s) shall be deemed to know and understand the content of the Proposal Call document and a submission of the MBDs will indicate the Bidder(s) unconditional acceptance of all the terms and conditions contained in the Proposal Call document.
- The Bidder(s) shall be deemed to have satisfied itself as to all of the conditions, procedures and performance and discharge of the obligations required in terms of the Proposal Call documents.
- The non-acceptance or variation of any of the conditions, or the inclusion of any other conditions in the Proposal Call document by the Bidder(s) will be treated as a qualified bid and will be disqualified
- The Proposal(s) will be evaluated by the JPC. JPC may accept any Proposal in whole or in part and is not bound to accept any Proposal
- Proposals will be evaluated using the evaluation criteria stated in JPC MBD 12.
- The Proposal(s) will be adjudicated by the JPC's Bid Adjudication Committee and awarded in terms of the JPC's Supply Chain Management Policy for Goods and Services.
- The JPC will not be held responsible or liable for any costs whatsoever and /or losses incurred or suffered by the Bidder(s) or any other party or parties for whatsoever reason as a result of the Proposal.
- Any Proposal in the name of a partnership or joint venture or consortium will, on acceptance, be deemed as joint and several agreements with all parties.
- All proposals shall remain valid for a period of **120 days** after the closing date, provided that bidders may extend the validity of the proposal on request of JPC.

RESOLUTIONS OF DISPUTES

- Persons or bidders who are aggrieved by decisions or actions taken in the implementation of Supply Chain Management system or in the awarding of the bid, must within 20 (twenty) days of the awarding of the bid, lodge a written complaint containing the details of the dispute arising to the Chief Executive Officer of JPC at the following address or telefax number:

1st Floor, Forum 2, Braampark, 33 Hoofd Street, Braamfontein

Fax: (010) 219 9400

- The written complaint must contain the following information:
 - The bid reference number;
 - The section of the Policy, Regulations or Act that has been violated;
 - The details of the violation;
 - The City Department or Municipal Owned Entity involved;
 - Relief sought.
- The Chief Executive Officer may appoint an independent person, from outside or within the City or JPC, to investigate and propose a dispute resolution mechanism to address the complaint. The person so appointed will be someone who was not involved in the transaction in question.

PROHIBITIONS

- JPC will not, subject to such amendments to the Act and Regulations and any exemptions as the Minister may promulgate from time to time, award contracts to Bidder(s) who are owned directly or indirectly by the following categories of persons:-
 - defined as an employee or public servant in the service of the state working for Local, Provincial and National Government; or
 - defined as an employee in the service of a government owned entity including the municipal entities;
 - if the employee mentioned above is actively or inactively a director, manager or principal shareholder of the service provider concerned (refer to GN44 in GG 28411 of 18 January 2006 for the exemption);
 - is a member of the board of directors of a municipal entity within its area of jurisdiction (refer to GN44 in GG 28411 of 18 January 2006 for the exemption);
 - who is an advisor or consultant contracted to the JPC for the purposes of assisting the JPC with defining of requirements, drafting of specifications or evaluation of the Proposals.
- JPC will not award Proposals to any Bidder(s) owned directly or indirectly by politicians serving as councillors for any municipality.
- JPC will not award Proposals to any Bidder(s) owned directly or indirectly by politicians serving in National Assembly, Provincial Legislatures and National Council of Provinces.
- Failure by the above mentioned persons to comply with the above shall lead to cancellation of the contract.

CONSIDERATION OF PROPOSALS FROM CLOSE FAMILY MEMBERS OF PERSONS IN THE SERVICE OF THE STATE

- The JPC does not encourage awarding of contracts to close family members of employees in decision-making positions.
- The bidder must declare and state whether a spouse, child or parent of the bidder or of a director, manager or shareholder is in the service of the City of Johannesburg Municipality, the City of Joburg Property Company, or has been in the service of the state in the previous twelve months.

GENERAL ENQUIRIES

Only email enquiries will be accepted, such enquiries must be directed to tenders@jhbproperty.co.za

JPC STANDARD CONDITIONS OF APPOINTMENT

(JPC MBD 15)

1. **Appointment in Force and Authorised Signatories:** This appointment is considered to have come into force immediately after all the necessary signatures have been appended.
2. **Independent Contractor:** The Service Provider is appointed as an independent contractor and no contract of agency and/or employment is created. Save as may be expressly authorised by JPC from time to time in writing, the Service Provider shall not hold itself out to be the agent of JPC and/or commit JPC to any contract or obligation of whatever nature.
3. **Alterations:** Should circumstances arise which call for modifications of the appointment, these may be made by mutual consent given in writing. Proposals in this respect from one party shall be given due consideration by the other party.
4. **Assignment:** The Service Provider shall not without the prior written consent of JPC, cede or assign any of the benefits and obligations under this appointment.
5. **Sub-Contracts:** Any sub-contracts or modifications or termination thereof relating to the performance of the services by the Service Provider shall be made only with the prior written consent of JPC.
6. **Compliance with Laws, By-laws and Ordinance:** The Service Provider shall comply strictly with every applicable law, by-law and ordinance including every regulation, code of conduct or other directive to which the Service Provider may be subject in its professional capacity. In this regard, the Service Provider's particular attention is drawn to the requirements of the Occupational Health and Safety Act (OHSA) and its regulations as well as to the Financial Intelligence Centre Act (FICA).
7. **Insurance:** If applicable, the Service Provider shall at its own cost and expense maintain professional indemnity insurance and public liability insurance with an insurer approved of by JPC in an amount and for duration as specified in the letter of appointment to which these general conditions of appointment relate.
8. **Postponement and Termination:** JPC may give written notice to the Service Provider at any time of its intention to abandon the services, in whole or in part, or to terminate this appointment. The effective termination date of this appointment shall not be less than fourteen (14) days after receipt of such notice, or such other shorter or longer periods as may be agreed between the parties. Upon receipt of such notice, the Service Provider shall take immediate steps to bring the services to a close and to reduce expenditure to a minimum.

Upon termination of the appointment the Service Provider shall deliver to JPC the originals of all documents in the possession of the Service Provider relating to and/or in connection with the appointment in both hard copy and (insofar applicable) electronic format.

9. **Force Majeure:** The Service Provider shall promptly notify JPC, in writing, of any situation or event arising from circumstances beyond its control and which he could not reasonably foresee, which makes it impossible for the Service Provider to carry out in whole or in part, his obligations under this appointment. Upon the occurrence of such a situation or event, the

services shall be deemed to be postponed for a period of time equal to the delay caused by the Force Majeure and a reasonable period not exceeding two weeks.

10. **Claims for Default:** Any claims for damages arising out of default and termination, shall be agreed between JPC and the Service Provider, or failing agreement, shall be referred to dispute resolution in accordance with clause 20.
11. **Rights and Liabilities of Parties:** *Termination of this appointment for whatever reason shall not prejudice or affect the accrued rights or claims and liabilities of either party to this appointment.*
12. **Confidentiality:** The Service Provider shall maintain all information relating to the appointment in the strictest confidence.
13. **Indemnity:** The Service Provider indemnifies JPC and holds JPC harmless against any loss or damage that may be suffered by JPC (including and without limiting the generality of the foregoing any claim that may be brought or threatened against JPC by any third party) arising from or by reason of the failure by the Service Provider to comply with its obligation in terms hereof.
14. **Skill, Care and Diligence:** The Service Provider shall exercise all reasonable skill, care and diligence in the performance of the services under the appointment and shall carry out all his responsibilities in accordance with recognised professional standards. If any documentation prepared or submitted by the Service Provider to JPC is approved by JPC such approval shall not limit the professional liability of the Service Provider in respect thereof. The Service Provider shall remain professionally liable in respect of such documentation notwithstanding the approval thereof by JPC.
15. **Faithful Advisor:** The Service Provider shall, in all professional matters, act as a faithful advisor to JPC and, in so far as his duties are discretionary, act fairly as between JPC and third parties.
16. **Indirect Payments:** The remuneration of the Service Provider charged to JPC, shall constitute his only remuneration in connection with the appointment and neither he nor his personnel shall accept any trade commission, discount, allowance or indirect payment or other consideration with or in relation to the appointment or to the discharge of his obligations thereunder.
17. **Royalties:** The Service Provider shall not have the benefit, whether directly or indirectly, of any royalty on or of any gratuity or commission in respect of any patented article or process used on or for the purposes of the appointment, unless it is agreed to by JPC in writing that he may.
18. **Ownership of Equipment, Materials, Supplies and Facilities:** Equipment, materials, supplies and facilities furnished to the Service Provider by JPC or purchased by the Service Provider with funds wholly supplied or reimbursed by JPC shall be the property of JPC and shall be so marked. Upon completion or termination of the services under this appointment, the Service Provider shall furnish to JPC, inventories of the equipment and materials referred to above as it then remains and dispose of same as directed by JPC.
19. **Copyright:** All copyright in and to all documents, plans, designs and other material of whatever nature prepared or produced by the Service Provider in the course and scope of its

appointment shall be and remain vested in JPC for which purpose the Service Provider cedes to JPC all such copyright.

20. *Dispute Resolution:*

- a. Any dispute arising between the Parties in respect of this appointment shall in the first instance be referred in writing to the senior executives of the Parties by either Party for resolution. The senior executives of the Parties shall meet within five (5) business days after receiving the aforesaid written referral and shall use their best endeavours to resolve the dispute within the time foregoing.
- b. If the senior executives fails to meet within five (5) business days after a dispute has been referred to them or fail to resolve the dispute within the time in paragraph (a) above, then either Party shall be entitled to immediately institute legal proceedings from a competent court.
- c. Notwithstanding anything to the contrary contained in this paragraph 20, any party shall be entitled to approach a competent court for an appropriate relief.

21. *Sequestration or Surrender of Service Provider's Estate*

In the event of an order being made for the sequestration of the Service Provider's estate, whether provisional or final, or in the event of an application being made for such order, or in the event of the Service Provider making application for the surrender of his estate, or if he shall enter into, make or execute any deed of assignment or other composition or arrangement with, or assignment for the benefit of his creditors, or purport to do so, or if the Service Provider, being a company, shall pass a resolution, or if the Court shall make an order for the liquidation of such company, the Council shall have the right, summarily and without recourse to law, to determine the contract without payment of any compensation to the Service Provider, and without prejudice to the right of the Council to sue the Service Provider for any damages sustained by it in consequence of one or other of the aforementioned events.

REGISTRATION DOCUMENTS

(JPC MBD 16)

THE FOLLOWING DOCUMENTS MUST BE ATTACHED HEREAFTER (AS MBD) AS PROOF OF REGISTRATION:

- *Natural persons, Sole proprietors and JVs of these – copy of ID document/passport*
- *Schools – copy of Provincial School registration certificate*
- *NGO – copy of Provincial registration certificate*
- *Society Club/ Association – copy of Constitution / founding document*
- *Partnership -copy of partnership agreement plus IDs of all partners*
- *Closed Corporation - Copy of CK1 and/or CK2 and members agreement*
- *Company – current CM29,*
- *Trust – letter of appointment from the Master of the High Court of SA and deed of trust*
- *Joint Venture/Consortium – JV/Consortium agreement plus ID documents/ company Registration document of all members of JV/Consortium*

BIDDER'S COMPANY PROFILE

(JPC MBD 17)

POWER OF ATTORNEY OR COMPANY RESOLUTION

(JPC MBD 18)

**PROOF OF UP TO DATE MUNICIPAL ACCOUNT / AFFIDAVIT / PROOF OF ARRANGEMENTS
TO SETTLE ARREARS (JPC MBD 19)**

JOINT VENTURE / CONSORTIUM AGREEMENT

(JPC MBD 20)

BIDDER'S EXPERIENCE AND LETTERS OF EXPERIENCE

JPC MBD 21

RELEVANT EXPERIENCE AND QUALIFICATIONS OF THE KEY PERSONNEL JPC MBD 22



TRANSFORMATION AND EMPOWERMENT PLAN INCLUDING PROOF OF LOCATION

JPC MBD 23