



INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR A PANEL OF PROFESSIONAL SERVICES

ADVERT DATE: 13 OCTOBER 2025

COMPULSORY BRIEFING MEETING DATE: 24 OCTOBER 2025

VENUE: JDA BUS FACTORY OFFICES

TIME: 10H00 – 11H00

CLOSING DATE: 17 NOVEMBER 2025

CLOSING TIME: 12H00

BID DESCRIPTION: RFP – ESTABLISHMENT OF A PANEL OF PROFESSIONAL SERVICE PROVIDERS FOR A PERIOD OF THREE (3) YEARS – RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND PUBLIC PRIVATE PARTNERSHIPS

BID NUMBER: JDADFP/ ADVISORY/25

BID DOCUMENTS MUST BE DEPOSITED IN THE BID BOX SITUATED AT:

Offices of the Johannesburg Development Agency, 3 Helen Joseph Street (Formerly President Street), The Bus Factory, Newtown, Johannesburg, 2000

Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.

NB: NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE (see definition below) || MSCM Regulations: “in the service of the state” means to be –

- (a) a member of –
 - (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.

ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:

Department: Procurement

Contact Person: Mr. Yandisa Dinga [E-mail: ydinga@jda.org.za](mailto:ydinga@jda.org.za)

ANY REQUIRIES REGARDING THE PROJECT MAY BE DIRECTED TO:

Department: Development Facilitation

Contact Person: Ms. Xolisile Sithole [E-mail: XSithole@jda.org.za](mailto:XSithole@jda.org.za)

PLEASE NOTE: TENDERS MUST BE SUBMITTED ON THE TENDER DOCUMENTATION ISSUED. TENDER DOCUMENTATION MUST NOT BE REPRODUCED OR REARRANGED. ANY ADDITIONAL INFORMATION MUST BE SUBMITTED AS A SEPARATE ATTACHMENT TO THE TENDER DOCUMENT FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED

OFFER PAGE

**THE FOLLOWING PARTICULARS MUST BE FURNISHED
(FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED)**

NAME OF BIDDER

BID NUMBER

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER CODE NUMBER

CELLPHONE NUMBER

FACSIMILE NUMBER CODE NUMBER

E-MAIL ADDRESS

COMPANY REGISTRATION NUMBER

NATIONAL CENTRAL SUPPLIER DATABASE NUMBER

VAT REGISTRATION NUMBER

TAX VERIFICATION PIN NUMBER

SIGNATURE OF BIDDER

CAPACITY UNDER WHICH THIS BID IS SIGNED

DATE

To all our stakeholders

RE: The channels of reporting fraudulent and Corrupt Activities

The City of Johannesburg has a **zero-tolerance approach to Fraud, Theft, Corruption, Maladministration, and Collusion** by suppliers with employees. To reinforce this commitment, more channels have been added to report any Fraudulent and Corrupt activities.

Instances of corporate fraud and misconduct remain a constant threat to service delivery. The City of Johannesburg took a resolution to adopt strategic interventions aimed at combatting fraud and corruption. The City took a decision to centralized the reporting of fraudulent and corrupt activities through the establishment of an independent fraud hotline which is managed by independent bidders.

All people doing business with the Johannesburg Development Agency are encouraged to report any corrupt or illegal practice.

Employees are encouraged to report fraud, waste or other concerns suggestive of dishonest or illegal activities.

Anyone can report fraudulent and corrupt activities through one of the following channels:

- Toll free number 0800 002 587
- Toll free Fax 0800 007 788
- SMS (charged @ R1.50)..... 32840
- Email Address: anticorruption@tip-offs.com
- Web site: www.tip-off.com
- Free post: Free post, KNZ 138, Umhlanga, 4320



Let's join hands to take up the Fight against Fraud and Corruption in our society.

REQUEST FOR PROPOSALS FOR:

ESTABLISHMENT OF A PANEL OF ADVISORY, RESOURCE MOBILISATION, TECHNICAL SERVICES AND PUBLIC PRIVATE PARTNERSHIPS FOR THE JOHANNESBURG DEVELOPMENT AGENCY, ON AN AS AND WHEN REQUIRED BASIS FOR A PERIOD OF 36 MONTHS

BID NUMBER: JDADFP/ ADVISORY /25

OCTOBER 2025

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ANNEXURES	
A : Business Declaration	
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COPY OF ADVERT

TENDERING PROCEDURES

Tender Notice and Invitation to Tender

BID DESCRIPTION: RFP – ESTABLISHMENT OF A PANEL OF ADVISORY, RESOURCE MOBILISATION, TECHNICAL SERVICES AND PUBLIC PRIVATE PARTNERSHIPS FOR THE JOHANNESBURG DEVELOPMENT AGENCY, ON AS AND WHEN REQUIRED BASIS FOR A PERIOD OF 36 MONTHS

BID NUMBER: JDADFP/ ADVISORY/25

The JDA is Requesting for Proposals from experienced Companies and/or JVs/Partnerships with Professional Resources to provide Resource Mobilisation (Capital Raising), Technical and Transaction Advisory Support services as well as Support for Public Private Partnerships for Strategic Programmes and Projects undertaken by the Johannesburg Development Agency. Key Resource Requirements include Capital Raising, Financial Advisory Services, Legal Advisory Services, Project Management Services (Infrastructure Project Management) and Business Analysts with a complement of Built Environment and related skills as well as B-BBEE Advisory Services.

Queries relating to procurement matters may be addressed to Mr. Yandisa Dinga at [e-mail: ydinga@jda.org.za](mailto:ydinga@jda.org.za)

Technical queries or queries relating to the project may be addressed to Ms. Xolisile Sithole [e-mail: XSithole@jda.org.za](mailto:XSithole@jda.org.za)

Documents may be downloaded from the JDA's website as follows: www.jda.org.za as well as on www.etenders.gov.za from **13 OCTOBER 2025**. Tenders must only be submitted on the tender documentation that is downloaded from the stipulated websites. The retyping of the tender document is not permitted.

A compulsory tender briefing meeting with representatives of the employer will take place at the Johannesburg Development Agency, The Bus Factory, 3 Helen Joseph Street, Newtown, 2000 on **24 October 2025 starting at 10H00 to 11H00**. GPS Coordinates - 26°12'18.4"S 28°01'54.3"E

The closing time and date for receipt of tenders is **12H00pm on 17 NOVEMBER 2025 Telegraphic, telephonic, telex, facsimile, e-mail, and late tenders will not be accepted.**

The physical address for the delivery of tender documents is Johannesburg Development Agency, Ground Floor Reception Area, The Bus Factory, 3 Helen Joseph Street (formerly President Street), Newtown 2000. GPS Coordinates - 26°12'18.4"S 28°01'54.3"E

Requirements for sealing, addressing, delivery, opening and assessment of tenders are stated in the Tender Data.

The JDA's selection of qualifying tenderers will be at the JDA's sole discretion and will be final. The JDA does not bind itself to accept any particular tender and correspondence will be entered into with successful tenderer.

"WE ENCOURAGE ALL PEOPLE DOING BUSINESS WITH US TO REPORT ANY CORRUPT OR ILLEGAL PRACTICE, USING THE ANTI-FRAUD HOTLINE NUMBER: 0800 002 587"

RFP FOR THE ESTABLISHMENT A PANEL OF ADVISORY, RESOURCE MOBILISATION, TECHNICAL SERVICES AND PPPs FOR 36-MONTHS

1 INTRODUCTION

The JDA is Requesting Proposals from Experienced Companies with Professional Resources to provide Resource Mobilisation (Capital Raising), Technical and Transaction Advisory Support services as well as Support for Public Private Partnerships for Strategic Programmes and Projects undertaken by the Johannesburg Development Agency. Key Resource Requirements Include Capital Raising, Financial Advisory Services, Legal Advisory Services, Project Management (infrastructure Project Management) and Business Analysts with a complement of Built Environment and related skills as well as B-BBEE Advisory Services.

The JDA as an Implementation Agency of the City assist City Departments in the planning, procurement and implementation of small, medium and large-scale transactions for infrastructure and related services. Through this panel, the JDA will also be able to assist Departments and Organs of State in establishing appropriate transactional advisory support for large projects and provide diverse advisory support for smaller transactions. Further to that, the JDA will also provide support for major infrastructure procurement projects, Public Private Partnerships (PPPs) and service delivery improvement programmes, including project conception and registration, capital raising, transaction process support, legal and financial advice. The key objective is to improve the quality of project outcomes by ensuring a link between the objectives of government and the ultimate contract. Transaction support involves transaction planning, feasibility analysis, procurement and institutionalization. The areas in which the services are provided include Human Settlements, Roads and Transport, Water and Sanitation, Energy, Telecommunications, Health and Education.

The establishment of this panel will also provide specialized resource mobilization and transaction advisory services in the implementation of PPPs, which involves a contract between the public sector authority and a private party, in which the private party provides a public service or project and assumes substantial financial, technical and operational risk in the project. In specific instances, this support may include project implementation monitoring and project implementation support on request. Transaction Advisors have an important role in the full procurement cycle from project identification, appraisal, structuring, tendering to financial close including documentation design and preparation and the training of contracting authority staff to manage the process.

Public Private Partnership (PPP) projects are required to comply with Treasury Regulation 16 of the Municipal PPP Regulations issued in terms of the Municipal Finance Management Act (MFMA).

2 APPOINTMENT

The appointment of the panel will be valid for a period of 36 months. The key resource requirements include a Resource Mobilisation and Capital Raising, Financial Advisory Services, Legal Advisory Services, Project Managers (infrastructure Project Management) and Business Analysts with a complement of Built Environment and related skills as well as B-BBEE Advisors Services - as either one professional consulting team or a consortium/ joint venture.

The professional services required are outlined below.

2.1 Resource Requirements

Request for Proposals are invited from multi-disciplinary professional service providers and must consist of the following resources:

a) Resource Mobilisation services (Capital Raising)

Resource mobilisation and Capital raising have become more critical now more than ever to address in the Infrastructure backlog facing the government. The ability and experience of project packaging coupled with raising capital for infrastructure projects through various vehicles i.e. Grant Funding, Development Finance, Project Finance and other financial instruments and programmes is amongst the key requirements for a successful bidder. The preferred bidders must be able to demonstrate the requisite skills and expertise in Packaging and mobilising funding i.e. Packaging of Grant Funding application and Proposals for strategic socio-economic projects being implemented by the Johannesburg Development Agency.

The JDA intends to leverage its current and future fiscal budget allocations by attracting the private sector, wealth funds, DFI's and donor grant funding to invest in various key economic infrastructure. There are various infrastructure Projects that are in desperate need of alternative funding sources.

b) Financial/Corporate Advisory Services

Financial advisory and modeling skills are critical in the feasibility study and value assessment stages of the PPP project cycle. The ability to construct a financial model to assess project finance and corporate finance proposals is fundamental to the reviews undertaken by the PPP Unit which culminate in the implementation of a PPP project. The service provider must have demonstrate experience to undertake increasingly complex financial analyses involving both project finance and Corporate Finance, Business modelling & Financial modelling of Municipal services or Government services for the JDA or its client departments as and when required.. Experience in analysing the financial aspects of PPPs is a basic requirement. Through this panel the JDA may request for Business Analysts to look at business optimisation, strategic documentation development and development of new business financial models, business plans or business cases, as well as operational plans for new facilities or investments. The services of the Financial, Corporate Advisory and that

of the Capital Raising Specialists will be supported by a). A Team Leader qualified in Economics/Finance/Development Finance/Accounting Qualification with minimum Capital Raising or Resource Mobilisation, b). A Business Analyst with experience in Business Analysis, Actuarial Science, Development Finance, Data Science, Statistics or Financial Modelling and c). And an additional personnel with experience in proposal writing or business modelling.

c) Legal Advisory Services

PPP transactions involve complex legal agreements that require more than mere legal drafting skills. Over and above drafting skills, the legal advisor must also possess negotiating, contract management and strategic skills in order to provide transaction advisory services required for PPP projects and other large infrastructure projects. The service provider must have demonstrated experience drafting and assisting in the implementation of infrastructure development contracts is a minimum requirement, three of which should be on PPPs or similar commercial transactions.

d) Project Managers (infrastructure Project Management) with a complement of Built Environment and related skills

The JDA from time to time will have a number of projects in Planning and Construction phase that will require Project Managers to manage the planning and implementation of PPP projects throughout the project life cycle. This will include managing the work of the transaction advisor, procurement process to the signing of the PPP agreement and financial closure, as well as managing all project stakeholders for the efficient and successful implementation of the project.

An experienced project manager as well as a support project manager are required to manage large and complex infrastructure projects or projects similar to PPPs. Additionally, the Project manager should be in a position to provide additional built environment services as stipulated below (if required by the JDA) or the JDA may choose its own professional team to merge/collaborate with the advisory team. The built environment professionals are to conduct feasibility studies, planning services or development preparation, designs and implementation of these infrastructure projects and also on an ad hoc basis. These include the following disciplines:

- Architect and Urban Designer, All Engineering Disciplines related to Infrastructure Planning and Construction, Property Specialists, Quantity Surveyor, Town and Regional Planner, Development Economist, Environmental and Heritage Specialist, Transport Planner and Engineer, Land Surveyor and GIS Specialists, Geologist, Social Facilitator and any other related specialist. These specialists will be required to be registered with the relevant Professional Bodies as Professionals and have the relevant skills, experience, and capacity.

e) Broad-Based Black Economic Empowerment (B-BBEE) Advisors

Government uses procurement as a vehicle to meet its Broad-Based Black Economic Empowerment (B-BBEE) transformation objectives. In the implementation of large infrastructure projects, it is often required for service providers to demonstrate in their tender proposals how they will practically meet these objectives. Government institutions often require services of BEE advisors to assist in advising how procurement of infrastructure projects could be structured to meet the BEE objectives. In PPP transactions BEE Advisors play a role during the feasibility stage, procurement and implementation stages.

3 NOTES

- 3.1 Appointments will be dependent on satisfactory performance and budget availability. An addendum will be issued at the commencement of the new financial year to confirm continued appointment.**
- 3.2 Applicants are to ensure that they have adequate resources to undertake the work under stringent timeframes.
- 3.3 Tenderers are required to take cognisance of the role of the other professionals and work coherently with them where required.
- 3.4 The JDA reserves the right to ask tenderers to replace any member/s of the proposed team if they do not meet the JDA requirements.
- 3.5 Successful tenderers will be required to sign the JDA's Standard Form of Agreement.
- 3.6 Tenderers must note that they will be required as and when necessary to attend (a) presentations to JDA, COJ, and stakeholders; (b) design, progress / site meetings and inspections; and (c) consultations with relevant persons and authorities including site visits. This needs to be taken into consideration in the tenderer's fee proposal.
- 3.7 Tenderers must also note that revisions to reports and / or designs may be required following feedback received from relevant stakeholders and / or approving authorities which may necessitate some rework, additional presentations, and meetings. This needs to be taken into consideration in the tenderer's fee proposal.
- 3.8 Tenders must take note that the discount percentage applied at tender stage will be applied for the duration of the project whether the project value increases or decreases.

- 3.9 The JDA will develop a rotation strategy & pay for a facilitation fee percentage. The facilitation fee to be paid by the JDA will be dependent on the RFQ or RFP in line with the rotational strategy of the panel once it has been developed.

4 PROPOSAL CONTENT

The bidder's submission must provide the JDA with sufficient information to enable the employer to make a sound and fair evaluation of the proposal. It must clearly indicate the **relevant** previous experience, capability, and capacity of the bidding entity to undertake the project. The proposal should use the same item numbers as below.

- ~~4.1 A valid BBBEE status level verification certificate substantiating the bidding entities BBBEE rating. Only certificates issued by verification agencies accredited by the South African Accreditation System (SANAS), or by registered auditors approved by the Independent Regulatory Board of Auditors (IRBA) will be accepted. FAILURE TO SUBMIT A BBBEE STATUS LEVEL CERTIFICATE WILL RESULT IN THE BIDDER SCORING ZERO (0) POINTS FOR BBBEE.~~
Any misrepresentation in terms of the above constitutes a criminal offence as set out in the B-BBEE Act as amended.

- 4.2 Company registration documents and a copy of a valid tax compliance status (CTS) letter issued by SARS. No tender will be awarded to a bidder whose tax matters are not in order with SARS at the time of award.
- 4.3 A certified copy of the bidder's Professional Indemnity Insurance certificate indicating the maximum value per claim in an insurance period, the applicable excess, and the expiry date. A minimum cover of R2m is required for this project.
- 4.4 A copy of the bidding entity's current municipal rates account in the name of the bidding entity or alternatively in the names of the directors / partners of the bidding entity. If not applicable, an affidavit to this effect is required. Copies of lease agreements or accounts with lessors will NOT be accepted.
- 4.5 Audited financial statements for the past three years.
- 4.6 Details of directors / partners / members and shareholders with certified copies of their identity documents.
- 4.7 The forms A to F annexed, must be scrutinized, completed in full and signed.
- 4.8 **Complete in full all information required on Annexure G : Organogram**

Provide information on the key personnel required per the organogram who will be assigned to this project.

The following supporting documentation **must** be provided :

- detailed CV's for each resource to be attached and also indicated on Annexure G.

CV's must note the resources' specific relevant project experience [i.e. **project description, role played and responsibilities, project value, start and end dates**]. *The number of years of experience in the required role similar nature and scale to this appointment*

- Relevant qualifications and attach certified proof hereof
- individual memberships to the stipulated professional associations and attach proof hereof

4.9 Complete in full all information required on Annexure H: Schedule of Completed Contracts

ONLY list a **maximum of 5 projects** completed by the bidding entity in the past 5 years of a similar nature and scale to this project.

The following supporting documentation **must** be provided :

- Contactable references : References must be for COMPLETED projects only. References must be on the client's letterhead or on a document with the client's company stamp and signed by the client. The letter / document **must** confirm the name of the project / description of the project, a description of the service rendered *(must be clear that the service rendered is aligned to the service being tendered for i.e. (PPP Project development and/or Advisory, Corporate Finance Advisory, Investment and Financial Modelling, Business Proposal Development for Infrastructure related or Capital Projects, Broad-Based Black Economic Empowerment (B-BBEE) Transaction and/or Advisory), the value of the works, the date when the project was completed (must be between 2020 and 2025) and it must rate the service rendered (eg. good, satisfactory, poor etc. and not just state that the bidder was involved in the project or that they completed the project).*

NOTE :

4.9.1 *Signed Reference Letters on Client's letterhead should be accompanied by an appointment letter or - official Purchase Orders*

4.9.2 *The organogram should be clearly drafted to include personnel and the roles and responsibility.*

4.10 Tenderers are to submit 2 copies of their proposal (1 original plus 1 copy).

~~FAILURE TO COMPLY WITH THE REQUIREMENTS IN ITEM 4.10 and 5.2 WILL RESULT IN TENDERERS BEEN DISQUALIFIED FOR NON-COMPLIANCE.~~

**FAILURE TO COMPLY WITH THE REQUIREMENTS IN ITEMS 5.3 TO 5.11 WILL RESULT IN TENDERERS BEEN
NEGATIVELY SCORED IN THE TECHNICAL ASSESSMENT.**

Note for consortium and joint ventures

- A lead consultant is to be appointed and noted in the submission. JDA will conclude a contract with the lead consultant
- Only the lead consultant is to submit the requisite documents and / or information as requested in items 5.2 to 5.9
- Item 5.11 MUST be addressed by each member of the consortium / joint venture
- An Agreement or Heads of Terms recording the arrangement between the parties to the consortium / joint venture is to be submitted.
- A trust, consortium or joint venture will qualify for points for their BBBEE status level as an unincorporated entity, provided that the entity submits their consolidated BBBEE scorecard as if they were a group structure and that such a consolidated BBBEE scorecard is prepared for every separate tender.

Failure to comply with these conditions may invalidate your offer.

5 ASSESSMENT CRITERIA

Submissions (responses to item 6 above) will be evaluated on the following criteria :

- Compliance
- Technical
- Risk Tolerance

5.1 Compliance

Bidders will be disqualified in the following instances :

- If any of its directors are listed on the register of defaulters;
- In the case of a bidder who during the last five years has failed to perform satisfactorily on previous contracts with the JDA or any other organ of state after written notice was given to that bidder that performance was unsatisfactory;
- Bidders who did not complete, in full, the tender offer page (i.e. all registration numbers provided and signed);

RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND PUBLIC PRIVATE PARTNERSHIPS FOR 36-MONTHS

- Bidders whose tender document has been completed in pencil;
- Bidders whose document has been faxed;
- Bidders whose tender document has been received after the closing time;
- Bidders whose tender document has not been deposited in the tender box at the time of closing;
- Bidders who failed to attend the compulsory tender briefing session;
- Bidders who have any directors in the employment of the state;
- No award will be made to any bidder whose tax matters are not in order with the receiver of revenue (SARS);
- No award will be made to any bidder who is not registered on the National Treasury Central Supplier Database (CSD);
- Bidders are required to include all the four (4) main specialists a). Finance/Corporate/PPP Advisory and Capital Raising Specialist, b). Legal Advisory Service Specialist, c). Project manager (Infrastructure Project Management) and d). and Broad-Based Black Economic Empowerment (B-BBEE) Advisor. **Failure to submit any of these four will result in the Disqualification of the submission.**

Tenderers will have to adhere to the compliance items above in order to be considered further in the evaluation process.

6 DURATION OF PANEL

The Panel will be valid for a period of Three (3) years (36 months).

7 TECHNICAL REQUIREMENTS

The technical assessment is based on the criteria set-out below namely (i) key returnable documents, (ii) capability of the proposed key team members (i.e. experience, qualifications, and memberships to professional associations) and (iii) the experience of the company (i.e. PPP Project development and/or Advisory, Corporate Finance Advisory, Investment and Financial Modelling, Business Proposal Development for Infrastructure related or Capital Projects Broad-Based Black Economic Empowerment (B-BBEE) Transaction and/or Advisory and references).

Tenderers will have to submit compliant documents and score a minimum number of points in the technical evaluation in order to be considered further in the evaluation process.

Bidders are expected to score a minimum of 245 points, 70% (out of 350 maximum points scoreable).

Variables	Total Points	Criteria	Description of criteria	Points	Points
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RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND PUBLIC PRIVATE PARTNERSHIPS
FOR 36-MONTHS

(i) KEY RETURNABLE DOCUMENTS per item 6 herein	N/A	Valid BBBEE status level certificate	Points will only be allocated for key returnable documents submitted as required / stipulated in item 6 herein Points will not be allocated for making reference to attached	N/A	Y / N
		Company registration documents		N/A	Y / N
		CTS letter from SARS		N/A	Y / N
		Valid Professional Indemnity Insurance R2m		N/A	Y / N
		Current municipal rates account / affidavit		N/A	Y / N
		3 Years audited financial statements		N/A	Y / N
		Certified copies of identity documents		N/A	Y / N
		Annexure A – H completed in full and signed		N/A	Y / N
		VARIABLES		TOTAL POINTS	CRITERIA
CAPABILITY OF PROPOSED TEAM per item 6 and Annexure G	50	1. FINANCE/CORPORATE/ PPP ADVISORY AND CAPITAL RAISING SPECIALIST x 1			
		Number of years' experience post qualification as a professional in Finance/Corporate/PPP Advisory with a CV that demonstrates project experience to undertake increasingly complex financial analyses evidence of experience in - Investment and financial analysis with relevant PPP and project finance - Financial modelling - Project structuring, project finance and other limited or non-recourse financing - PPP procurement and structuring - Preparation of bankable projects - Negotiating commercial agreements	CVs must show a minimum of three projects with values, roles played in relation to the scope stipulated played and project period. If any of this information is not contained in the CV then zero points will be awarded.	30 points (+10 years) 20 points (5-9 years) 10 points (3-4 years) 0 points (less than 3 years)	
		An Honour's degree in Finance, Economics or Accounting, equivalent commercial qualification or higher.	Proof of qualification must be provided to obtain the points. All foreign applications must be SAQA accredited	10	
		A valid Professional registration with the South African Institute of Chartered Accountants (SAICA), Chartered Institute of Management Accountants	Proof of registration must be provided to obtain the points.	10	

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		(CIMA), Chartered Financial Analyst Institute (CFA) or similar.		
VARIABLES	TOTAL POINTS	CRITERIA	DESCRIPTION CRITERIA	POINTS
CAPABILITY OF PROPOSED TEAM per item 6 and Annexure G	50	2. LEGAL ADVISORY SERVICES SPECIALIST x 1		
		Number of years of experience post qualification and post admission as an Attorney (Commercial) with a CV that demonstrates project experience in - Legal Advisory in PPP in large public sector or commercial transactions and contract negotiations. - Conducting legal due diligence on a project at various stages of the project cycle. - Negotiating of PPP or commercial agreements - Drafting of contracts and agreement - Drafting, evaluation and advice on all processes and contractual solutions throughout the procurement phase, including contract negotiations. - Advisory in the planning and execution of negotiations of government contracts with the private sector or a mix of Design, Build, Finance, Maintain, Operate (DBFMO) projects.	CVs must show a minimum of three projects with values, roles played in relation to the scope stipulated played and project period. If any of this information is not contained in the CV then zero points will be awarded.	30 points (+10 years) 20 points (5-9 years) 10 points (3-4 years) 0 points (less than 3 years)
		An LLB/Commercial Law Degree or higher.	Proof of qualification must be provided to obtain the points. All foreign applications must be SAQA accredited	10
		A valid Admission as an Attorney with the High Court of South Africa.	Proof of admission must be provided to obtain the points.	10
VARIABLES	TOTAL POINTS	CRITERIA	DESCRIPTION CRITERIA	POINTS

CAPABILITY OF PROPOSED TEAM per item 6 and Annexure G	50	3. PROJECT MANAGER (INFRASTRUCTURE PROJECT MANAGEMENT) x1		
		Number of years of experience post qualification as a Project Manager. The resource is to submit a CV that demonstrates project experience in managing the planning and construction of large scale infrastructure PPP projects throughout the project life cycle (stage 1-6). This includes managing the work of all the built environment specialist, and project stakeholders.	CVs must show a minimum of three projects with values, roles played in relation to the scope stipulated played and project period. If any of this information is not contained in the CV then zero points will be awarded.	30 points (+10 years) 20 points (5-9 years) 10 points (3-4 years) 0 points (less than 3 years)
		A NQF level 8 degree or higher in the Built Environment, Law, Finance, or similar.	Proof of qualification must be provided to obtain the points. All foreign applications must be SAQA accredited	10
		A valid professional of registration with SACPCMP or ECSA or SACAP or relevant built environment body recognised in South Africa.	Proof of registration must be provided to obtain the points.	10
VARIABLES	TOTAL POINTS	CRITERIA	DESCRIPTION CRITERIA	POINTS
CAPABILITY OF PROPOSED TEAM per item 6 and Annexure G	50	4. BROAD-BASED BLACK ECONOMIC EMPOWERMENT (B-BBEE) ADVISOR x1		
		Number of years of experience post qualification as a Broad-Based Black Economic Empowerment (B-BBEE) practitioner or Specialist. The resource is to submit a CV that demonstrates project experience in - Technical and practical application of the BEE Codes of Good Practice. - Financial and BEE modelling, scorecard optimisation, risk management, valuation, and optimal transaction structuring.	CVs must show a minimum of three projects with values, roles played in relation to the scope stipulated played and project period. If any of this information is not contained in the CV then zero points will be awarded.	30 points (+10 years) 20 points (5-9 years) 10 points (3-4 years) 0 points (less than 3 years)

RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND PUBLIC PRIVATE PARTNERSHIPS FOR 36-MONTHS

		- Post project implementation analysis and monitoring. - Application of BEE legislation and objectives in procurement for large scale infrastructure projects.		
		A Master's degree in Business Administration (MBA)/ Management, Commerce, Human Resources, Labour Relations, or relevant related NQF 9 qualification or Higher.	Proof of qualification must be provided to obtain the points. All foreign applications must be SAQA accredited	20 points

VARIABLES	TOTAL POINTS	CRITERIA	DESCRIPTION CRITERIA	POINTS
CAPABILITY OF PROPOSED TEAM per item 6 and Annexure G	50	5. PROJECT SUPPORT TEAM		
		A Team Leader must have an NQF 8 Economics/Finance/Development Finance/Accounting Qualification or similar with minimum experience of 5 years in Capital Raising or Resource Mobilisation.	CVs must show a minimum of two projects with roles played in the project. If any of this information is not contained in the CV then zero points will be awarded.	15 Points
		Personnel must have a minimum of an NQF level 7 qualification in Developmental studies or Business Management with experience of 3 years or more in proposal writing or business modelling.	Proof of qualification must be provided to obtain the points. All foreign applications must be SAQA accredited	10 Points
		Personnel must have of an NQF level 7 Project Management Qualification with experience of 3 years more in Infrastructure Projects.		10 Points
		A Business Analyst with a relevant NQF 8 qualification with experience of 5 years more in Business Analysis, Actuarial Science, Development Finance, Data Science, Statistics or Financial Modelling.		15 Points

SCHEDULE OF COMPLETED PROJECTS WITH REFERENCES				
COMPANY EXPERIENCE	50	Number of references of projects competed or participated in of similar a nature, scale and complexity	Points will only be allocated to references that demonstrate that the below services were rendered in a project: ✓ PPP Project development and/or Advisory ✓ Corporate Finance Advisory ✓ Investment and Financial Modelling ✓ Business Proposal Development for Infrastructure related or Capital Projects ✓ Broad-Based Black Economic Empowerment (B-BBEE) Transaction and/or Advisory ✓ Legal Advisory References must be on client letterhead or document stamped and signed by the client and must include the name / description of the project, it must confirm the service rendered, the minimum value of R10 million within the last 5 years of the project, the date completed and a comment on the level of satisfaction with the service rendered. If any of the required information is not contained in the reference then zero points will be awarded per letter.	50 points (5 or more project references) 40 points (4 project references) 30 points (3 project references) 20 points (2 projects) project references) 10 points project references (1 reference) No points for 0 project references
Company Experience in relation to Resource Mobilisation or Capital raising				
Company experience in relation to funding/resource mobilization.	50	Traceable record for successful completion of funding/financial resource mobilising proposals.	A traceable record will be evaluated on the basis of: - Official Reference letter on Client's letterhead confirming Capital raised or financial resources mobilized on behalf of a client for a minimum value of R10million within the last 5 years from a reputable funder.	50 points (5 projects) 40 points (4 projects) 30 points (3 projects) 20 points (2 projects) 10 points (1 project)

			The Reference Letter must be accompanied by an Appointment Letter or Official Purchase Order.	
Total potential scoring points = 350				

Bidders are expected to score a minimum of 245 points, 70% (out of 350 maximum points scoreable).

7.1 Risk Tolerance

The JDA has adopted a Risk Tolerance Framework (RTF) which enjoins the JDA to consider its risk exposure to contractors / service providers in terms of the number of contracts awarded to a single contractor / service provider in a particular year. In terms of the Risk Tolerance Framework, the JDA determines the risk exposure as excessive in instances where the value of the contracts for individual professional service providers (eg. project managers / engineers / quantity surveyors / consultants) is either :

~~The greater of R8 million or four contracts / projects in the current financial year or
The greater of R12 million or six contracts / projects over two financial years (current year and previous financial year)~~

~~And in instances where the value of contracts for multi-disciplinary professional service providers (eg. more than one discipline / service is provided by the same bidder) is either :~~

~~The greater of R12 million or six contracts / projects in the current financial year or
The greater of R20 million or nine contracts / projects over two financial years (current year and previous financial year)~~

A risk analysis shall be undertaken on the bidder with the highest number of points obtained, to determine whether the tenderer does not exceed the JDA's risk framework criteria as stated above. In other words, whether it falls within the ambit of the Risk Tolerance Framework as acceptable.

JDA reserves the right to award a contract to a bidder who has exceeded the threshold as stated above.

8 CLOSING DATE, TIME AND VENUE FOR SUBMISSIONS

The completed tender document shall be placed in a sealed envelope. The words:

“BID DESCRIPTION: RFP – ESTABLISHMENT OF A PANEL OF ADVISORY, RESOURCE MOBILISATION, TECHNICAL SERVICES AND PUBLIC PRIVATE PARTNERSHIPS FOR THE JOHANNESBURG DEVELOPMENT AGENCY, ON AS AND WHEN REQUIRED BASIS FOR A PERIOD OF 36 MONTHS ”

The envelope must be deposited in the tender box at the **Johannesburg Development Agency, Ground Floor, The Bus Factory, 3 Helen Joseph Street (Formerly President Street), Newtown** only between the hours of 08H00 and 12H00.

The Tender closes at 12h00 on 17 November 2025

Envelopes will be stamped on receipt. There will be a public opening of tenders.

NO LATE / TELEPHONIC / FAXED / POSTAL TENDERS WILL BE ACCEPTED OR CONSIDERED.

The Johannesburg Development Agency's selection of qualifying tenders shall be in the Johannesburg Development Agency's sole discretion and shall be final. The Johannesburg Development Agency does not bind itself to accept any particular tender and no correspondence will be entered into.

Unsuccessful bidders will have the opportunity to query the award or decision within fourteen (14) calendar days from the day of notification.

The tender offer validity period for this tender is 120 days .

Queries can be addressed in writing to:

Xolisile Sithole

E-mail: XSithole@jda.org.za

Form A: Business Declaration

Tender/RFP Number :

Tender/RFP Description :

Name of Company :

Postal Address :

.....

Physical Address :

.....

Telephone :

Fax :

Contact Person :

Cell Phone Number
:

E-Mail Address :

Company/enterprise Income

Tax Reference Number ** :

(Insert personal income tax number if a one person business and personal income tax numbers of all
partners if a partnership)

VAT Registration Number :

Company Registration Number:

1. Type of Firm

- ☐ Partnership
☐ One person business/sole trader
☐ Close corporation
☐ Public company
☐ Private company

(Tick One Box)

2. Principal Business Activities

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

**RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND
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3. Total number of years firm has been in business:

4. Detail all trade associations/professional bodies in which you have membership.

.....

.....

5. Did the firm exist under a previous name?

☐ Yes

☐ No

(Tick one box)

If yes, what was its previous name?.....

6. How many permanent staff members are employed by the firm:

Full Time:

Part Time:

7. What is the enterprise's latest annual turnover (excl. VAT): R.....

8. List the personnel or firms who provide the following services:

SERVICE	NAME	CONTACT PERSON	TELEPHONE
ACCOUNTING			
LEGAL			
AUDITING			
BANKING			
INSURANCE			

9. List all contracts which your company is engaged in and have not yet completed:

CONTRACT DESCRIPTION	LOCATION	COMPANY/ EMPLOYER	CONTRACT AMOUNT	EXPECTED COMPLETION (MONTH & YEAR)

RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND
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SIGNATURE :

NAME IN FULL :

CAPACITY :

DULY AUTHORIZED TO SIGN ON BEHALF OF:

DATE :

BANK DETAILS

I/We hereby request and authorize you to pay any amounts which may accrue to me/us to the credit of my/our account with the mentioned bank.

I/We understand that the credit transfers hereby authorized will be processed by computer through a system known as the "ACB Electronic Fund Transfer Service" and

I/We also understand that no additional advice of payment will be provided by my/our bank, but details of each payment will be printed on my/our bank statement or any accompanying voucher.

This authority may be cancelled by me/us giving 30 days notice in writing.

BANK:

BRANCH:

BRANCH CODE:

ACCOUNT NUMBER:

ACCOUNT HOLDER:

TYPE OF ACCOUNT:

PLEASE INCLUDE ORIGINAL SIGNED AND STAMPED LETTER FROM THE BANK CONFIRMING THE COMPANY'S BANKING DETAILS, PHOTOSTAT COPIES AND LETTERS BEARING ELECTRONIC SIGNATURES WILL NOT BE ACCEPTABLE.

The undersigned, who warrants that he/she is duly authorised to do so on behalf of the company, affirms that the information furnished in response to this request for proposal is true and correct:

SIGNATURE :

NAME IN FULL :

CAPACITY :

DULY AUTHORIZED TO SIGN ON BEHALF OF:

DATE :

FORM B : DECLARATION OF INTEREST

1. No bid will be accepted from persons in the service of the state*.
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.

3.1 Full Name:

3.2 Identity Number:

3.3 Position occupied in the company (director, trustees, shareholder**)
.....

3.4 Company Registration Number:

3.5 Tax Reference Number:

3.6 VAT Registration Number:

- 3.7 The names of all directors / trustees / shareholders / members, their individual identity numbers and state employee numbers must be indicated in paragraph 4 below.

- 3.8 Are you presently in the service of the state*
YES / NO

If yes, furnish particulars

.....

.....

RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND
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3.9 Have you been in the service of the state for the past twelve months?
YES / NO

If yes, furnish particulars

.....
.....

3.10 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?

YES / NO

If yes, furnish particulars

.....
.....

3.11 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?

YES / NO

If yes, furnish particulars

.....
.....

3.12 Are any of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state?

YES / NO

If yes, furnish particulars

.....
.....

3.13 Are any spouse, child or parent of the company's directors, trustees, managers, principle shareholders or stakeholders in service of the state?

YES / NO

If yes, furnish particulars

RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND PUBLIC PRIVATE PARTNERSHIPS FOR 36-MONTHS

.....

.....

- 3.14 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 businesses whether or not they are bidding for this contract?

YES / NO

If yes, furnish particulars

.....

.....

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

FULL NAME	IDENTITY NUMBER	STATE EMPLOYEE NUMBER

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)

.....

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM IS TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....

RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND
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Signature

Position

.....
Name of Bidder

.....
Date

* MSCM Regulations: "in the service of the state" means to be –

(a) a member of –

(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.

** "Stakeholder" 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

**FORM C : DECLARATION OF BIDDER'S PAST SUPPLY CHAIN
MANAGEMENT PRACTICES**

- 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:
 - a. abused the municipality's / municipal entity's supply chain management system or committed any improper conduct in relation to such system;
 - b. been convicted for fraud or corruption during the past five years;
 - c. willfully neglected, reneged on or failed to comply with any government, municipal or other public sector contract during the past five years; or
 - d. 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 as a company or person 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 National Treasury after the <i>audi alteram partem</i> rule was applied).	Yes ☐	No ☐
4.1.1	If so, furnish particulars:		
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)? (To access this Register enter the National Treasury's website, www.treasury.gov.za, click on the icon "Register for Tender Defaulters" or submit your written request for a hard copy of the Register to facsimile number (012) 3265445).	Yes ☐	No ☐

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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:		
Item	Question	Yes	No
4.4	Does the bidder or any of its directors owe any municipal rates and taxes or municipal charges to the municipality / municipal entity, or to any other municipality / municipal entity, that is in arrears for more than three months?	Yes ☐	No ☐
4.4.1	If so, furnish particulars:		
4.5	Was any contract between the bidder and the municipality / municipal entity or any other organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
4.7.1	If so, furnish particulars:		

CERTIFICATION

I, THE UNDERSIGNED (FULL NAME)

CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION FORM TRUE AND CORRECT.

I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND
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.....
SIGNATURE

.....
DATE

.....
POSITION

.....
NAME OF BIDDER

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

JOHANNESBURG DEVELOPMENT AGENCY
CERTIFICATE OF INDEPENDENT BID DETERMINATION

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
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

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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.

.....
 Signature

.....
 Date

.....
 Position

.....
 Name of Bidder

**RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND
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FORM E: Particulars of all Contracts awarded by an Organ of State/ Private entity during the last 5 years (in the event of insufficient space, attach additional information in supplementary document)

EMPLOYER	CONSULTING ENGINEER	NATURE OF WORK	VALUE OF WORK	YEAR OF COMPLETION

EMPLOYER	CONSULTING ENGINEER	NATURE OF WORK	VALUE OF WORK	YEAR OF COMPLETION

.....

SIGNATURE
(of person authorised to sign on behalf of the Tenderer)

.....

DATE

Organ of State means-

- a) a national or provincial department;
- b) a municipality;
- c) a constitutional institution defined in the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- d) Parliament;
- e) a provincial legislature;
- f) any other institution or category of institutions included in the definition of “organ of state” in section 239 of the Constitution and recognised by the [Minister](#) by notice in the *Government Gazette* as an institution or category of institutions to which [this Act](#) applies

ANNEXURE F: DECLARATION ON STATE OF MUNICIPAL ACCOUNTS

- A Any bid will be rejected if:
 Any municipal rates and taxes or municipal service charges owed by the bidder or any of the directors to the municipality or a municipal entity, or to any other municipality or municipal entity, are in arrears for more than three months.
- B Bid Information
- i. Name of bidder:
- ii. Registration Number:
- iii. Municipality where business is situated

- iv. Municipal account number for rates:
- v. Municipal account number for water and electricity:
- vi. Names of all directors, their ID numbers and municipal account number.
1.
2.
3.

- 4.
- 5.
- 6.
- 7.

C Documents to be attached.

- i. A copy of municipal account mentioned in B (iv) & (v) (Not older than 3 months)
- ii. A copy of municipal accounts of all directors mentioned in B(vi) (Not older than 3 months)
- iii. Proof of directors

I/We declare that the abovementioned information is true and correct and that the following documents are attached to this form:

.....

Signature

Date

.

ANNEXURE G : ORGANOGRAM THIS ANNEXURE IS CRITICAL FOR THE TECHNICAL EVALUATION

The tenderer shall list below the key personnel proposed for this project in the discipline and designation being tendered for

DESIGNATION	NAME AND SURNAME
Finance/Corporate/PPP Advisory and Capital Raising Specialist	
Legal Advisory Service Specialist	
Project manager (Infrastructure Project Management)	
Broad-Based Black Economic Empowerment (B-BBEE) Advisor.	
A Team Leader - Economics/Finance/Development Finance/Accounting	
Personnel - Developmental studies or Business	
Personnel - Project Management	
Personnel - Business Analyst	

TABLE 1: FINANCE/CORPORATE/PPP ADVISORY AND CAPITAL RAISING SPECIALIST

Key Resource Information	
Resource Information	
Designation:	FINANCE/CORPORATE/PPP ADVISORY AND CAPITAL RAISING SPECIALIST
Name & Surname	
Nationality	
ID / Passport Number	
First Qualification Name Incl. Date of Qualification and Institution	
Highest Qualification Name Incl. Date of Qualification and Institution	
Years Experience after initial relevant Qualification	
Professional Registration Body / Institution	
Date of Professional Registration	
Professional Registration Number	

FINANCE/CORPORATE/PPP ADVISORY AND CAPITAL RAISING SPECIALIST

Project Name	Project Type (refer to technical scoring criteria)	Client Name & Contact Details	Specific Tasks completed by yourself

TABLE 2: LEGAL ADVISORY SERVICES

Key Resource Information	
Resource Information	
Designation:	LEGAL ADVISORY SERVICES
Name & Surname	
Nationality	
ID / Passport Number	
First Qualification Name Incl. Date of Qualification and Institution	
Highest Qualification Name Incl. Date of Qualification and Institution	
Years Experience after initial relevant Qualification	
Professional Registration Body / Institution	
Date of Professional Registration	
Professional Registration Number	

LEGAL ADVISORY SERVICES

Project Name	Project Type (Refer to technical scoring criteria))	Client Name & Contact Details	Specific Tasks completed by yourself

TABLE 3: PROJECT MANAGERS (INFRASTRUCTURE PROJECT MANAGEMENT)

Key Resource Information	
Resource Information	
Designation:	INFRASTRUCTURE PROJECT MANAGERS
Name & Surname	
ID / Passport Number	
First Qualification Name Incl. Date of Qualification and Institution	
Highest Qualification Name Incl. Date of Qualification and Institution	
Years Experience after initial relevant Qualification	
Professional Registration Body / Institution	
Date of Professional Registration	
Professional Registration Number	

PROJECT MANAGERS (INFRASTRUCTURE PROJECT MANAGEMENT)

Project Name	Project Type (Refer to Technical scoring Criteria)	Client Name & Contact Details	Specific Tasks completed by yourself

TABLE 4: BROAD-BASED BLACK ECONOMIC EMPOWERMENT (BBBEE) ADVISORS

Key Resource Information	
Resource Information	
Designation:	Broad-Based Black Economic Empowerment (BBBEE) Advisors
Name & Surname	
ID / Passport Number	
First Qualification Name Incl. Date of Qualification and Institution	
Highest Qualification Name Incl. Date of Qualification and Institution	
Years Experience after initial relevant Qualification	
Professional Registration Body / Institution	
Date of Professional Registration	
Professional Registration Number	

BROAD-BASED BLACK ECONOMIC EMPOWERMENT (BBBEE) ADVISORS

Project Name	Project Type (Refer to Technical Scoring Criteria)	Client Name & Contact Details	Specific Tasks completed by yourself

NOTE: Detailed Curriculum Vitae (CV's) of the above proposed candidates must be provided. Said CV's MUST indicate the name and description of the project, role played in the project, project value, and the start and end dates of the project. In addition certified proof of relevant qualifications and proof of memberships to stipulated professional associations must also be provided for the above proposed personnel.

.....

Signature

.....

Position

.....

Name of Bidder

.....

Date

ANNEXURE H: SCHEDULE OF COMPLETED CONTRACTS

THIS ANNEXURE IS CRITICAL FOR THE TECHNICAL EVALUATION
The tenderer shall list below a **maximum of 5 projects of a similar nature and scale** to this project

Table H : Company: Project Related Experience	
Company Information	
Company Name	
Year Established	
Professional Registration Body / Institution	
Date of Professional Registration	

Company Authorised Representative	
Authorised Representative Name	
Representative Contact Number	
Representative Contact Email	

Company Project Related Experience								
Project Name	Project Type (Refer to Technical Scoring Criteria – Company Experience)	Project Value (Excluding Construction Costs)	Construction Value (if available)	Project Start Date	Project End Date	Project Description	Client Name & Contact Details	Specific Tasks completed relevant to this Tender Proposal Terms of Reference
1.								
2.								

RFP FOR THE ESTABLISHMENT OF THE RESOURCE MOBILISATION, TECHNICAL AND TRANSACTION ADVISORY SERVICES AND PUBLIC PRIVATE PARTNERSHIPS FOR 36-MONTHS

3.								
4.								
5.								

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

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