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### Joburg Market (SOC) Ltd

Heidelberg Road  
City Deep  
Johannesburg  
2049

PO Box 86007  
City Deep,  
Johannesburg  
South Africa  
2049

Tel +27(0) 11 992 8000  
Fax +27(0) 11 613 7381  
E-mail: info@joburgmarket.co.za

[www.joburgmarket.co.za](http://www.joburgmarket.co.za)  
[www.joburg.org.za](http://www.joburg.org.za)

## REQUEST FOR QUOTATION NO: RSK – 4209563 - 2025/2026

**APPOINTMENT OF A SERVICE PROVIDER TO SUBMIT A PROPOSAL FOR AN INTEGRATED GRC SYSTEM TO SUPPORT AND EMBED AN ENTERPRISE RISK MANAGEMENT FRAMEWORK, INCLUDING STRATEGY & PLANNING, RISK MANAGEMENT, ETHICS, AND COMPLIANCE MANAGEMENT METHODOLOGIES AT JOBURG MARKET.**

<p><b>Issued by:</b></p> <p><b>The Joburg Market: Supply Chain Department</b></p> <p><b>P.O. Box 86007 Fortune Road City Deep Johannesburg 2049</b></p> <p><a href="mailto:quotations@joburgmarket.co.za">quotations@joburgmarket.co.za</a></p> <p><b>for enquires</b></p>
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Full name of bidding/tendering entity: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Tel Number: \_\_\_\_\_

CSD registration MAAA \_\_\_\_\_

Contract Price (excl VAT): \_\_\_\_\_

Contract Price (incl. VAT): \_\_\_\_\_

Advert date: **24 April 2026**

Closing date and time: **04 May 2026@ 11H00**

Submission: **quotations@joburgmarket.co.za**

Bidders to submit a quotation as per the scope of work

## 1. Project Description

Appointment of a service provider to submit a proposal for an Integrated GRC System to support and embed an Enterprise Risk Management Framework, including Strategy & Planning, Risk Management, Ethics, and Compliance Management Methodologies at Joburg Market.

## 2. Scope of Work

The Joburg Market is considering the implementation of a software tool or solution that can help manage and report on the entity's performance against pre-determined objectives, strategic risks, ethics and compliance information across the organization. The goal is to enhance productivity in performance, compliance and risk management by improving the already established internal controls and processes.

The system should integrate all Governance, Risk and Compliance matters and serve as a central repository, it should be able to streamline, and standardize processes concerned with GRC and align to best practice requirements such as the National Treasury, MFMA, ISO 31000 and related prescripts.

**PHASE 1:** The system should be able to do the following:

1. Organizational Performance Management, Monitoring, Evaluation and Review
2. Align to organizational goals from planning through to reporting
3. Risk management
4. Capture Key Performance Indicators, Key Risk Indicators and supporting evidence
5. Provide structured and systematic approach to risk, ethics and compliance management
6. Align to company set targets and Risk Appetite and Tolerance
7. Capture, manage and provide real time reporting mechanisms
8. Align to regulatory requirements and provide updates for regulatory changes and enhancements
9. Assess the current ICT, data, and digital maturity of Joburg Market
10. Align digital initiatives with trading, logistics, quality, and financial systems
11. Clarify the Smart Market vision and data-driven service delivery model
12. Strengthen governance, risk, and compliance frameworks
13. Identify priority digital and data-enabled projects
14. Develop a realistic implementation roadmap and investment plan
15. Build leadership ownership and institutional commitment
16. The service provider should be able to provide training on the utilisation of the system

The system should at a minimum demonstrate the following capabilities for Performance Management:

<p><b>1. Strategic Planning &amp; Alignment Module</b>  <b>Purpose:</b> Enable long-term planning and alignment across the organization.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Capture <b>JM 5-Year Strategic Plan</b> and Smart Market priorities</li> <li>• Define <b>vision, mission, strategic goals, and objectives</b></li> <li>• Integrate a <b>Data Strategy Framework</b> (data governance, ownership, standards)</li> <li>• Capture <b>programmes, projects, and initiatives</b></li> <li>• Link strategic plans to: <ul style="list-style-type: none"> <li>○ Departmental plans</li> <li>○ Smart Market priorities</li> </ul> </li> <li>• Cascade objectives to: <ul style="list-style-type: none"> <li>○ Strategic Business Units (SBUs)</li> <li>○ Departments</li> <li>○ Individual employees (performance contracts)</li> </ul> </li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Scenario planning and forecasting</li> <li>• Strategy mapping (e.g., Balanced Scorecard perspectives)</li> <li>• Budget linkage to strategic objectives</li> <li>• Risk and assumption logging at planning stage</li> </ul>	<p><b>2. Organizational Scorecard Management</b>  <b>Purpose:</b> Translate strategy into measurable performance.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Create and manage: <ul style="list-style-type: none"> <li>○ Organizational scorecards</li> <li>○ Departmental scorecards</li> <li>○ SBU scorecards</li> </ul> </li> <li>• Define: <ul style="list-style-type: none"> <li>○ KPAs (Key Performance Areas)</li> <li>○ KPIs (Key Performance Indicators)</li> <li>○ Baselines, targets, and weightings</li> </ul> </li> <li>• Align scorecards across all levels</li> <li>• Configure reporting periods (monthly, quarterly, annual)</li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Weighted scoring and automated score calculation</li> <li>• Scorecard version control</li> <li>• Alignment validation (top-down consistency checks)</li> </ul>
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<p><b>3. KPI &amp; Indicator Management</b>  <b>Purpose:</b> Standardize performance indicators and ensure data integrity.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Create and manage KPIs and indicators</li> <li>• Define: <ul style="list-style-type: none"> <li>○ Indicator descriptions and purpose</li> <li>○ Calculation formulas</li> <li>○ Baselines and targets</li> </ul> </li> <li>• Specify: <ul style="list-style-type: none"> <li>○ Data sources (systems, manual input, integrations)</li> <li>○ Data collection methods</li> </ul> </li> </ul> <p><b>Data Governance &amp; Quality:</b></p> <ul style="list-style-type: none"> <li>• Data validation rules (range checks, completeness, consistency)</li> <li>• Automated data quality checks and exception reporting</li> <li>• Integration with source systems (e.g., ERP, HR, Finance)</li> <li>• Benchmarking against: <ul style="list-style-type: none"> <li>○ Historical performance</li> <li>○ Industry standards (where applicable)</li> </ul> </li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Metadata management (data dictionary)</li> <li>• KPI ownership and accountability tracking</li> </ul>	<p><b>4. Performance Monitoring &amp; Tracking</b>  <b>Purpose:</b> Track ongoing performance and flag risks early.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Capture monthly/quarterly performance results</li> <li>• Compare actuals vs targets automatically</li> <li>• Display performance status: <ul style="list-style-type: none"> <li>○ On track</li> <li>○ At risk</li> <li>○ Off track</li> </ul> </li> <li>• Provide dashboards for real-time monitoring</li> </ul> <p><b>Security &amp; Access Control:</b></p> <ul style="list-style-type: none"> <li>• Role-based access control (RBAC)</li> <li>• User roles (Admin, Manager, Employee, Auditor)</li> <li>• Audit trails for all updates and changes</li> </ul> <p><b>Alerts &amp; Notifications:</b></p> <ul style="list-style-type: none"> <li>• Automated alerts for: <ul style="list-style-type: none"> <li>○ Underperformance</li> <li>○ Missed submissions</li> <li>○ Data Anomalies</li> </ul> </li> <li>• Escalation workflows for persistent underperformance</li> </ul>
<p><b>5. Performance Measurement &amp; Data Management</b>  <b>Purpose:</b> Ensure accurate, auditable performance data.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Capture actual performance results</li> <li>• Upload and link supporting evidence</li> <li>• Maintain historical performance records</li> </ul> <p><b>Data Validation &amp; Integrity:</b></p> <ul style="list-style-type: none"> <li>• Multi-level validation:</li> </ul>	<p><b>6. Performance Analysis &amp; Improvement Management</b>  <b>Purpose:</b> Diagnose issues and drive continuous improvement.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Capture reasons for underperformance</li> <li>• Record root cause analysis (RCA)</li> <li>• Define corrective and preventative actions (CAPA)</li> <li>• Track implementation of improvement initiatives</li> </ul>

<ul style="list-style-type: none"> <li>○ Automated validation rules</li> <li>○ Supervisor approval workflows</li> <li>• Integration with data quality tools/systems</li> <li>• Data reconciliation across systems</li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Time-stamped entries and audit logs</li> <li>• Data locking after submission periods</li> <li>• Version control for submitted results</li> </ul>	<p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Trend analysis and variance analysis</li> <li>• Predictive analytics (forecasting future performance)</li> <li>• Link risks to performance issues</li> <li>• Lessons learned repository</li> </ul>
<p><b>7. Performance Review &amp; Evaluation</b>  <b>Purpose:</b> Formal evaluation of performance at all levels.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Support: <ul style="list-style-type: none"> <li>○ Monthly monitoring reviews</li> <li>○ Quarterly performance reviews</li> <li>○ Mid-year assessments</li> <li>○ Annual evaluations</li> </ul> </li> <li>• Workflow for review and approvals</li> <li>• Scoring and rating mechanisms</li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Moderation workflows (cross-department consistency)</li> <li>• Performance appraisal integration (HR systems)</li> <li>• Commenting and feedback tracking</li> <li>• Digital sign-off and approvals</li> </ul>	<p><b>8. Portfolio of Evidence (PoE) Management</b>  <b>Purpose:</b> Ensure audit-ready documentation and verification.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Upload supporting documents (multiple formats)</li> <li>• Link evidence to KPIs and results</li> <li>• Enable: <ul style="list-style-type: none"> <li>○ Version control</li> <li>○ Document tagging and categorization</li> </ul> </li> </ul> <p><b>Verification &amp; Audit:</b></p> <ul style="list-style-type: none"> <li>• Evidence validation workflows</li> <li>• Reviewer and auditor access</li> <li>• Audit trails for document changes</li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Optical Character Recognition (OCR) for document search</li> </ul> <p>Expiry tracking for time-sensitive documents</p>
<p><b>9. Reporting &amp; Analytics Module</b>  <b>Purpose:</b> Provide insights and decision-support information.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Generate reports: <ul style="list-style-type: none"> <li>○ Organizational performance reports</li> <li>○ Departmental reports</li> <li>○ Quarterly and annual reports</li> </ul> </li> <li>• Provide dashboards and visual analytics</li> </ul>	<p><b>10. Workflow &amp; Process Automation (NEW)</b>  <b>Purpose:</b> Streamline PMS processes end-to-end.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Configurable workflows for: <ul style="list-style-type: none"> <li>○ Planning</li> <li>○ Submission</li> <li>○ Review and approval</li> </ul> </li> <li>• Automated reminders and task assignments</li> </ul>

<p><b>Export &amp; Sharing:</b></p> <ul style="list-style-type: none"> <li>• Export formats: <ul style="list-style-type: none"> <li>◦ PDF</li> <li>◦ Excel</li> <li>◦ PowerPoint</li> </ul> </li> <li>• Automated report scheduling and distribution</li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Interactive dashboards (drill-down capability)</li> <li>• Custom report builder</li> <li>• Real-time analytics and KPI heatmaps</li> </ul>	<ul style="list-style-type: none"> <li>• SLA tracking for submissions and approvals</li> </ul>
<p><b>11. Integration &amp; Interoperability (NEW)</b>  <b>Purpose:</b> Ensure seamless data exchange across systems.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Integration with: <ul style="list-style-type: none"> <li>◦ HR systems (employee data)</li> <li>◦ Financial systems (budget, expenditure)</li> <li>◦ ERP and operational systems</li> </ul> </li> <li>• API support for external integrations</li> <li>• Data import/export capabilities</li> </ul>	<p><b>12. Security, Compliance &amp; Audit (NEW)</b>  <b>Purpose:</b> Ensure system integrity and compliance.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• Role-based access control (RBAC)</li> <li>• Data encryption (in transit and at rest)</li> <li>• Full audit logs of: <ul style="list-style-type: none"> <li>◦ Data changes</li> <li>◦ User activity</li> </ul> </li> <li>• Compliance with governance frameworks (e.g., POPIA if applicable)</li> </ul>
<p><b>13. User Experience &amp; Administration (NEW)</b>  <b>Purpose:</b> Ensure usability and efficient system management.</p> <p><b>Core Functions:</b></p> <ul style="list-style-type: none"> <li>• User-friendly interface and dashboards</li> <li>• Mobile accessibility</li> <li>• System configuration (KPIs, templates, workflows)</li> <li>• User and role management</li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Help guides and tooltips</li> <li>• Training and onboarding modules</li> </ul>	

**The system should at a minimum demonstrate the following capabilities for Compliance and Risk Management:**

<p><b>Context setting</b></p>	<p><b>Strategy Objective</b>                  The relevant organizational and business objective, targets and performance indicator should be captured in the system.                  They should align to captured Key Risk Indicators.                  They should align to set risk thresholds that have defined risk appetite and tolerance levels.                  The system should allow for capturing different stakeholders and their objectives.</p>
<p><b>Risk identification and assessment</b></p>	<p>Purpose of this is to provide specific information that would enhance the reader's understanding of the risk situation.                  Capturing of the following                  Risk Category: The "risk category" where the risk exists must be identified and captured                  Risk Name: Once a risk is identified, management must give it a short name. This enables easier referencing for risk reporting purposes.                  Background to the Risk/Description: Management must provide a detailed description of the risk. This description will describe the unwanted event, the root causes, and the consequences.                  Risk Consequence: The consequences of each risk event must be defined and recorded. The consequences may be described in financial or qualitative terms. A list of possible consequences is provided in the company's Possible Risks procedure.                  Impact: Insert the description of the relevant value from the rating tables included in the Risk Assessment Procedure.                  Impact rating: Insert the relevant value from the rating tables included in the Risk Assessment Procedure.                  Likelihood: Insert the description of the relevant value from the rating tables included in the Risk Assessment Procedure.                  Likelihood rating: Insert the relevant value from the rating tables included in the Risk Assessment Procedure.                  Inherent Risk (IR): system automatically calculates the inherent risk exposure based on management's input for Impact and Likelihood.                  Current Controls: Existing controls or responses, designed to reduce the risk's potential impact or likelihood. These controls must be recorded here.                  Control Effectiveness: During the risk assessment process, management must state the perceived effectiveness of current controls. Defined in the organizational risk framework                  Control Rating: During the risk assessment process, management must state the perceived effectiveness of current controls. Insert the relevant value from the rating tables included in the Risk Assessment Procedure.                  Residual Risk Rating: Residual risk exposure reflects the uncontrolled portion of the inherent risk exposure. Management is not expected to populate this column because it will be updated automatically based on management's assessment of the Inherent risk rating and key control effectiveness rating.                  Risk Owner: This reflects the name of the nominated person responsible who will coordinate a response to the risk.</p>
<p><b>Risk mitigation and response</b></p>	<p>Purpose: Developing and implementing strategies to mitigate or avoid risk, including action plans and assigning responsibilities.                  Capturing of the following                  Actions to Improve Management of the Risk: Risk mitigation improvement plans must be recorded here.                  If the risk mitigation plan is complex, then management should prepare a detailed project plan.                  Action Owner: This reflects the name of the nominated person responsible who will coordinate the risk mitigation / project plan for the risk.                  Start and Due Date: Record the start and end / deadline for completion of the risk mitigation</p>

	plan
<b>Automated Risk Monitoring</b>	<p><b>Purpose:</b> Track ongoing performance and non-performance early.</p> <p><b>Monthly and quarterly escalations:</b> Continuously tracking risks and providing real-time updates to ensure effective response. Sending prompt reminders before and on due dates and providing progress on mitigations / actions. Sending escalation emails to line managers for overdue tasks.</p>
<b>Compliance and Ethics management</b>	<p><b>Capturing of the following</b> System aligned to regulatory universe and sending prompts for new or amended regulations. System should align compliance risks to relatable regulatory requirements (CRMPs)</p>
<b>Incident management</b>	<p><b>Capturing of the following</b> Record incidents, the nature and possible implications, mitigation and report on remedial action taken.</p>
<b>Risk Performance Reporting</b>	<p><b>Purpose:</b> Provide insights and decision-support information.</p> <p><b>Generate different reports:</b></p> <ul style="list-style-type: none"> <li>○ Strategi risk reports</li> <li>○ Departmental risk reports</li> <li>○ Ethics and Integrity management risk reports</li> <li>○ Compliance risk reports</li> <li>○ Monthly, quarterly and annual reports</li> <li>○ Risk Status reports</li> <li>○ Overdue task reports</li> </ul> <p>Provide dashboards, graphical and visual analytics</p> <p><b>Export &amp; Sharing:</b></p> <ul style="list-style-type: none"> <li>• Export formats: <ul style="list-style-type: none"> <li>○ PDF</li> <li>○ Excel</li> <li>○ PowerPoint</li> </ul> </li> <li>• Automated report scheduling and distribution</li> </ul> <p><b>Enhancements:</b></p> <ul style="list-style-type: none"> <li>• Interactive dashboards (drill-down capability)</li> <li>• Custom report builder</li> <li>• Real-time analytics and heatmaps</li> </ul>

## **EVALUATION REQUIREMENTS**

### **1. ADMINISTRATIVE REQUIREMENTS (RETURNABLES)**

- a) Completed and signed MBD 3.1, 4, 6.1
- b) All pages of the document must be initialled
- c) Completed and signed consent and acknowledgments form in terms of the Protection of Personal Information Act (Act 04 of 2013) as amended
- d) Rates and taxes account not older than three months or signed lease agreement
- e) Proof of JV bank account (if applicable)
- f) Copies of share certificates (if applicable)

### **1.1 MANDATORY REQUIREMENTS**

An administrative evaluation will be carried out on all the bids received and if the under mentioned documentation is not signed and/or attached such a bid will be eliminated from any further evaluation

- a) Registration on the National Treasury Central Supplier Database illustrating required compliance 1,2 and 3 below
  - Or
  - 1. Submission of a compliant Good Standing TCS, or a Tender TCS or alternatively supply the unique pin number to access the Tax compliance status
  - 2. Proof of company registration documents.
  - 3. I.D. copies for directors/shareholders
- b) In case of Joint Venture, Consortium, Trust, or Partnership, a consolidated Valid Tax Clearance Status Certificate and/or SARS issued pin code (which will be verified)
- c) In case of Joint Venture, Consortium, Trust, or Partnership, a signed teaming agreement must be submitted.
- d) In case of Joint Venture, Consortium, Trust, or Partnership a Consolidated B-BBEE certificate for all members is required.
- e) In case of Joint Venture, Consortium, Trust, or Partnership a Consolidated Central Supplier Database Registration (CSD) is required.

**I, THE UNDERSIGNED (FULL NAME) \_\_\_\_\_**

**HAS BEEN DULY AUTHORIZED TO SIGN ALL DOCUMENTS, CERTIFY THAT THE INFORMATION FURNISHED IS TRUE AND CORRECT.**

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

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Position**

\_\_\_\_\_  
**Name of Bidder**

## 2. EVALUATION CRITERIA

The tender document includes functionality as evaluation criteria to assess the ability of the bidders to execute the project a follow:

Minimum Required Score for functionality is: 80 points out of 100 points and any bidder scoring less than 100 points will not be considered for further evaluation

FUNCTIONAL AREAS	SCORES
<p><b>Staff, Key Personnel qualifications and Experience</b></p> <p>Show that you have necessary skills and qualifications in Research &amp; Strategy formulation within Information Technology by:</p> <ul style="list-style-type: none"> <li>• Submission of CV that contains educational background and past work experience</li> <li>• Submission of certified copies of qualifications</li> <li>• Bidders with international qualifications must submit a SAQA Certificate of Evaluation to confirm the authenticity of the foreign qualification and its placement on the South African National Qualifications Framework (NQF)</li> </ul>	20
<p><b>Past Relevant Experience - =Letter of Reference to Implement an Automated Web Based GRC System in a public sector institution or municipality.</b></p> <p>The reference letter must contain the following information</p> <ul style="list-style-type: none"> <li>• Name of the organisation and contact person</li> <li>• Date on which the services was provided</li> <li>• Description of the services provided</li> <li>• Telephone number and email address</li> </ul>	20
<p><b>Performance Management System</b> (screenshots demonstrating all functions must be attached):</p> <p><b>The system must accommodate the following:</b></p> <ol style="list-style-type: none"> <li>a) Enable long-term planning and alignment across the organization.</li> <li>b) Translate strategy into measurable performance</li> <li>c) Standardize performance indicators and ensure data integrity</li> <li>d) Track ongoing performance and flag risks early</li> <li>e) Ensure accurate, auditable performance data</li> <li>f) Diagnose issues and drive continuous improvement</li> <li>g) Performance Review &amp; Evaluation</li> <li>h) POE uploading, previewing and the approval/rejection thereon</li> <li>i) Reporting &amp; Analytics Module</li> <li>j) Streamline PMS processes end-to-end</li> <li>k) Integration &amp; Interoperability</li> <li>l) Ensure system integrity and compliance</li> <li>m) User Experience &amp; Administration</li> </ol>	20

Risk management system integration - Ability for the following (screenshots demonstrating all functions must be attached): <b>a)</b> An electronic risk register following ISO 31000 / COSO framework steps that can be exported <b>b)</b> Action plans assigned to employees for reporting <b>c)</b> The uploading of POE per action plan <b>d)</b> The approval/rejection of action plans reported <b>e)</b> The extraction of various risk monitoring reports / dashboards / graphs <b>f)</b> Escalation mechanism to line manager for overdue tasks <b>g)</b> Pop up functionality for due task reporting	20
<b>Accreditation with a recognized and certified professional body</b>	10
<b>Training</b>	10
<b>TOTAL</b>	100

<b>Bidders will be evaluated in terms of functionality as part of the minimum requirements</b>		
<b>Category</b>		<b>Weight</b>
<b>Staff, Key Personnel qualifications and Experience Skills of resources (attach CV's and qualifications of relevant personnel)</b> <b>Foreign qualifications are required to be accompanied by a SAQA evaluation</b>	<b>Team Leader – 8 points</b> <ul style="list-style-type: none"> <li>• Post Graduate Qualification (NQF 8) in Business Management/Business Administration/ Business Leadership - <b>4 points</b>. With experience</li> <li>• Bachelor's degree in business management or project management (NQF 7– <b>2 points</b>. With experience</li> <li>• No qualification – <b>0 points</b></li> <li>• Experience in project management 10+ years of experience (detailed CV to be attached) – <b>4points</b>. (With relevant / specified qualification)</li> </ul>	20

- 1-9 years of experience (Detailed CV to be attached)– **2 point.** (With relevant / specified qualification)
- No experience – **0 Points**

**Performance Management Consultant – 6 points**

- Post Graduate Qualification NQF 8 in Accounting or Finance/Business Management/ Business Administration (– **4 points** (with relevant experience)
- Bachelor’s degree in business management or project management (NQF 7)– **2 points.** (with relevant experience)
- Proven practical experience in Organizational (IDP, SDBIP and Budget Formulation) and (Performance agreements, performance assessment) of a Municipality / Entity. 8 + years of experience – **2 points.** (With relevant / specified qualification) (detailed CV to be attached)
- 1-7 years of experience – **1 point.** (With relevant / specified qualification) (detailed CV to be attached)
- No experience – **0 Points**

**Risk Management Consultant – 6 points**

- Certified Risk management Prac / Prof with B Degree in Risk Management/Internal

	<p>Audit/External Audit– <b>4 points</b> (with relevant experience)</p> <ul style="list-style-type: none"> <li>• B Degree in Risk Management/Internal Audit/External Audit (Certified certificates to be attached) – <b>2 points</b> (with relevant experience)</li> <li>• Proven practical experience in Risk Management work/consulting in a public sector institution of a Municipality. 8 + years of experience – <b>2 points</b>. (With relevant / specified qualification) (detailed CV to be attached)</li> <li>• 1-7 years of experience – <b>1 point</b>. (With relevant / specified qualification) (detailed CV to be attached)</li> <li>• No experience – <b>0 Points</b></li> </ul>	
<p><b>Experience</b></p> <p>The reference letter/s must contain the following information on the company's letterhead</p> <ul style="list-style-type: none"> <li>• Name of the organisation</li> <li>• Description of the services provided</li> <li>• Telephone number and email address of contact person</li> </ul>	<p><b>Experience to Implement an Automated Web Based GRC System in a public sector institution or municipality.</b> (Reference letters.)</p> <ul style="list-style-type: none"> <li>• 4 or more public sector institution or municipality - <b>20 points</b></li> <li>• 1 – 3 public sector institution or municipality - <b>10 points</b></li> <li>• <b>No references – 0 Points</b></li> </ul>	20
<p><b>Performance Management System</b></p>	<ul style="list-style-type: none"> <li>• <b>20 points</b> if the system meets (a) to (m)</li> <li>• <b>10 points</b> if system lacks 50% of the requirements including POE uploading and audit tracking</li> <li>• <b>0 points</b> if system meets less than 50% of the requirements.</li> </ul>	20
<p><b>Electronic Risk Management System</b></p>	<ul style="list-style-type: none"> <li>• <b>10 points</b> if the system meets (a) to (g)</li> </ul>	20

	<ul style="list-style-type: none"> <li>• <b>5 points</b> if system lacks <b>(f and g above)</b></li> <li>• <b>0 points</b> if system has no required components.</li> <li>• <b>5 points</b> if system links or aligns to regulatory universe</li> <li>• <b>5 points</b> if system provides regulatory updates</li> <li>• <b>0 points</b> if system has no required regulatory components.</li> </ul>	
<p><b>Accreditation with a recognised and certified professional body (ISACA, PECB, ISC)</b></p> <p>System providers must have accreditation with SITA or Quality Council of Trades and Occupations (QCTO) which include related modules (Performance Management, IDP, Risk Management, Internal Audit) for Local Government.</p>	<ul style="list-style-type: none"> <li>• Accreditation: <b>10 points</b> (valid and current accreditation letter to be provided)</li> <li>• No accreditation: <b>0 points</b></li> </ul>	10
<p><b>Training</b></p> <p>Experience in providing GRC-related training in Local Government: (Appointment letters and reference letters to be provided)</p>	<ul style="list-style-type: none"> <li>• 1 -3 Projects - <b>3 points</b></li> <li>• 4 – 6 projects - <b>5 points</b></li> <li>• 7 or more projects - <b>10 points</b></li> </ul>	10

Bidder/s that meets the minimum required percentage or minimum points will be subject price and Specific Goals evaluation as per the PPPFA Act, No.5 of 2000 as amended and its associated Regulations, 2022 issued by the National Treasury.

**PRICING SCHEDULE – FIRM PRICES  
(PURCHASES)**

**NOTE: ONLY FIRM PRICES WILL BE ACCEPTED. NON-FIRM PRICES (INCLUDING PRICES SUBJECT TO RATES OF EXCHANGE VARIATIONS) WILL NOT BE CONSIDERED**

**IN CASES WHERE DIFFERENT DELIVERY POINTS INFLUENCE THE PRICING, A SEPARATE PRICING SCHEDULE MUST BE SUBMITTED FOR EACH DELIVERY POINT**

Name of Bidder.....

Bid Number.....

Closing Time **11H00**

Closing Date .....

Item no	Description	Qty	Unit price	Total
1	System as per the proposal	1		
2	User Training	20		
3	Licenses (12months)	20		
4	Monthly support (12months)	1		
5	Other (specify)			
			Subtotal total	
			VAT 15%	
			Total	

**BID PRICE IN RSA CURRENCY\*\* (ALL APPLICABLE TAXES INCLUDED)**

- Does the offer comply with the specification(s)? \*YES / NO
- If not to specification, indicate deviation(s) .....
- Period required for delivery .....  
\*Delivery: Firm / Not firm
- Delivery basis .....

Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

\*\* "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

**DECLARATION OF INTEREST**

No bid will be accepted from persons in the service of the state<sup>1</sup>.

1. 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.
  
2. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

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<sup>2</sup>):.....

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
-----	----

3.8.1. If yes, furnish particulars. ....

<sup>1</sup>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.

<sup>2</sup> 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.

3.9 Have you been in the service of the state for the past twelve months?

YES	NO
-----	----

3.9.1. 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
-----	----

3.10.1. 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
-----	----

3.11.1. 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
-----	----

3.12.1. If yes, furnish particulars. ....

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

YES	NO
-----	----

3.13.1. If yes, furnish particulars.....

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 business whether or not they are bidding for this contract.

YES	NO
-----	----

3.14.1. If yes, furnish particulars:.....

**4. Full details of directors / trustees / members / shareholders (If employed by the state)**

Full Name	Identity Number	State Employee Number (If employed by the state)

.....

**Signature**

.....

**Date**

.....

**Capacity**

.....

**Name of Bidder**

**PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022**

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

**1. GENERAL CONDITIONS**

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

a) The applicable preference point system for this tender is the 80/20 preference point system.

1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

The maximum points for this tender are allocated as follows:

	<b>POINTS</b>
<b>PRICE</b>	<b>80</b>
<b>SPECIFIC GOALS</b>	<b>20</b>
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

1.3 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.4 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

**2. DEFINITIONS**

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

### 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

#### 3.1. POINTS AWARDED FOR PRICE

##### 3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right) & \mathbf{or} & P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)
 \end{array}$$

Where

- P<sub>s</sub> = Points scored for price of tender under consideration
- P<sub>t</sub> = Price of tender under consideration
- P<sub>min</sub> = Price of lowest acceptable tender

#### 3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

##### 3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc}
 \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\
 \\
 P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right) & \mathbf{or} & P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)
 \end{array}$$

Where

- P<sub>s</sub> = Points scored for price of tender under consideration
- P<sub>t</sub> = Price of tender under consideration
- P<sub>max</sub> = Price of highest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
  - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

**Table 1: Specific goals for the tender and points claimed are indicated per the table below.**

**Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)**

The specific goals allocated points in terms of this tender	Means of verification <b>Evidence must be provided to claim points</b>	Number of points allocated (80/20 system)	Number of points allocated (80/20 system) <b>(To be completed by the bidder)</b>
SMME's An EME OR QSE)	CSD, B-BBEE Certificate/ Affidavit Sworn under oath	10	
Business Owned by 51% or more – Black People	CSD B-BBEE Certificate/ Affidavit Sworn under oath	10	

#### DECLARATION WITH REGARD TO COMPANY/FIRM

- 4.3. Name of company/firm.....
- 4.4. Company registration number: .....
- 4.5. TYPE OF COMPANY/ FIRM
- Partnership/Joint Venture / Consortium
  - One-person business/sole propriety
  - Close corporation

- Public Company
- Personal Liability Company
- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I 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 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
  - (a) disqualify the person from the tendering 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 tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted 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, if deemed necessary.

<p>.....</p> <p><b>SIGNATURE(S) OF TENDERER(S)</b></p> <p><b>SURNAME AND NAME:</b> .....</p> <p><b>DATE:</b> .....</p> <p><b>ADDRESS:</b> .....</p> <p>.....</p> <p>.....</p>
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## **CONSENT AND ACKNOWLEDGMENTS IN TERMS OF THE PROTECTION OF PERSONAL INFORMATION ACT 2013 (POPI)**

This section sets out how personal information will be collected, used and protected by Joburg Market hereinafter referred to as “JM”, as required by the Protection of Personal Information Act. The use of the words “the individual” for the purposes of this document shall be a reference to any individual (bidder) communicating with JM and/or concluding any agreement, registration or application, with the inclusion of each of those individuals referred to or included in terms of such agreement, registration or application.

### **1. What is personal information?**

The personal information that JM requires relate to names and surnames, birth dates, identity numbers, passport numbers, demographic information, education information, occupation information, health information, addresses, memberships, and personal and work email and contact details.

### **2. What is the purpose of the collection, use and disclosure (the processing) of personal information?**

JM is legally obligated to collect, use and disclose personal information for the purposes of:

- Reporting initiatives to the City of Johannesburg Municipality;
- reporting to National Treasury all contracts awarded;
- obtaining information related to Tax Compliance information from SARS;
- Verifying information on the National Treasury database of defaulters;
- evaluating and processing applications for registration on the database;
- compiling statistics and other reports;
- providing personalised communications;
- complying with the law; and/or
- Validation of information
- For a purpose that is ancillary to the above. Personal information will not be processed for a purpose other than what is identified (the purpose) above without obtaining consent beforehand.

### **3. How will Joburg Market process personal information?**

JM will only collect personal information for the purpose as stated above. Information will be collected in the following manner:

- directly from the individual;
- from service providers who provided with services or goods to JM;
- from JM’s own records relating to previous supply of services or goods; and/or
- from a relevant public or equivalent entity.

### **4. To whom will personal information be disclosed?**

The personal information may be disclosed to other relevant public or other entities on whose behalf we act as intermediaries, other third parties referred to above in relation to the purpose or who are sources of personal information, service providers such as professional bodies who operate across the borders of this country (trans border flow of information) where personal

information must be sent in order to provide the information and/or services and/or benefits requested or applied for. In the event of another party/ies acquiring all of or a portion of JM's mandate or functions, personal information will be disclosed to that party but they will equally be obliged as we are, to protect personal information in terms of this policy and the law.

#### **5. Consent and Permission to process personal information:**

I hereby agree with the policy and provide authorisation to JM to process the personal information provided for the purpose stated:

- I understand that withholding of or failure to disclose personal information will result in JM being unable to perform its functions and/or any services or benefits I may require from JM.
- Where I shared personal information of individuals other than myself with JM I hereby provide consent on their behalf to the collection, use and disclosure of their personal information in terms of this personal information policy and I warrant that I am authorised to give this consent on their behalf.
- To this end, I indemnify and hold JM not responsible in respect of any claims by any other person on whose behalf I have consented, against JM should they claim that I was not so authorised.
- I understand that in terms of POPIA and other laws of the country, there are instances where my express consent is not necessary in order to permit the processing of personal information, which may be related to police investigations, litigation or when personal information is publicly available.
- I will not hold JM responsible for any improper or unauthorised use of personal information that is beyond its reasonable control.

#### **6. Rights regarding the processing of personal information:**

- The individual may withdraw consent to the processing of personal information at any time, and should they wish to do so, must provide JM with reasonable notice to this effect. Please note that withdrawal of consent is still subject to the terms and conditions of any contract that is in place. Should the withdrawal of consent result in the interference of legal obligations, then such withdrawal will only be effective if JM agrees to same in writing. JM specifically draws to the attention that the withdrawal of consent may result in it being unable to provide the requested information and/or services and/or financial or other benefits.
- In order to withdraw consent, please contact the JM Information Officer/SCM
- A copy of the full JM policy is available
- Individuals are encouraged to ensure that where personal information has changed in any respect to notify JM so that our records may be updated. JM will largely rely on the individual to ensure that personal information is correct and accurate.
- The individual has the right to access their personal information that JM may have in its possession and are entitled to request the identity of which third parties have received and/or processed personal information for the purpose. Please note however, that any request in this regard may be declined if:
  - the information comes under legal privilege in the course of litigation,
  - the disclosure of personal information in the form that it is processed may result in the disclosure of confidential or proprietary information,

- giving access may cause a third party to refuse to provide similar information to JM,
- the information was collected in furtherance of an investigation or legal dispute, instituted or being contemplated,
- the information as it is disclosed may result in the disclosure of another person's information,
- the information contains an opinion about another person and that person has not consented, and/or
- the disclosure is prohibited by law.

**7. Queries relating to breach of personal information:**

- Please submit queries relating to the breach of personal information to the JM's information officer and SCM in writing as soon as the breach is discovered

<p><b>Name:</b> _____</p> <p><b>Signature:</b> _____</p>	<p><b>Date:</b></p>
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**In recent months, numerous companies have suffered substantial financial losses as a result of fraudulent requests for "COLD DRINK," purportedly originating from government departments.**

**These fraudsters are presently contacting service providers under the guise of Joburg Market officials, soliciting payments in exchange for appointment opportunities. Typically, these attempts occur shortly after the publication of tender closing registers on the website.**

**It's important to note that Joburg Market officials will never contact service providers to solicit any form of compensation for tender awards.**

**If you receive such a solicitation, please report it immediately to [tenders@joburgmarket.co.za](mailto:tenders@joburgmarket.co.za).**

**To mitigate the risk of falling victim to these scams, companies are strongly advised to verify the authenticity of any awards by contacting Joburg Market directly using the landline contact details provided on the official website.**

**Service providers are cautioned against participating in such activities, as Joburg Market will not assume liability for any resulting losses.**