



## INVITATION TO BID

### YOU ARE HEREBY INVITED TO BID FOR PROFESSIONAL SERVICES

ADVERT DATE: **24 March 2025**

COMPULSORY BRIEFING: **27 March 2025**

TIME: **10H00 – 11H00**

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

CLOSING DATE: **07 April 2025**

CLOSING TIME: **12H00**

BID DESCRIPTION: **RFP: PROJECT MANAGEMENT, ERP OPTIMISATION SERVICES FOR THE JDA FOR A PERIOD OF 12 MONTHS**

BID NUMBER: JDA/SAP/03-2025

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)

<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.

**ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:**

Department: Procurement  
Contact Person: Thapelo Kgaphola  
Tel: 011 688 7851

Fax: 011 688 7899

E-mail: [tkgaphola@jda.org.za](mailto:tkgaphola@jda.org.za)

**ANY REQUIRIES REGARDING THE PROJECT MAY BE DIRECTED TO:**

Department: Internal Audit  
Contact Person: Mzwakhe Mokoena  
Tel: 011 688 7811

Fax: 011 688 7899

E-mail: [mmokoena@jda.org.za](mailto:mmokoena@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**

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

NAME OF BIDDER .....

BID DESCRIPTION .....

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 .....

SUB TOTAL BID PRICE ..... **Excluding Value Added Tax**

15% **VAT** .....

TOTAL BID PRICE ..... **Including Value Added Tax**

TOTAL BID PRICE in words .....

.....

..... excluding Value Added Tax / including Value Added Tax (**please circle the relevant one**)

SIGNATURE OF BIDDER .....

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

DATE .....

**SUPPLIERS DATABASE REGISTRATION**

National Treasury launched the National Central Supplier Database (NCSD) with effect from 1 September 2015.

This will enable prospective suppliers to register their companies on the following website [www.csd.gov.za](http://www.csd.gov.za)

**Transitional Period (1 September 2015 to 30 June 2016)**

1. During the transitional period suppliers are requested to register on the website where all their essential information such as Tax Clearance Certificates, VAT, Company Registration Numbers and CIPC business status will be verified.
2. When conducting business with the JDA, you will be requested to provide us with the following:
  - Supplier Number and;
  - Supplier Registration Security Code so we can print your real time information;
  - Banking details with bank Stamp and;
  - Certified BBBEE Certificate.

Once a supplier has registered on NCSD, it will no longer be a requirement to provide the JDA with an Original Tax Clearance Certificate or any other registration documents.

**After Transitional Period 1 July 2016**

Effective 1 July 2016, the JDA will only award business to suppliers who are registered on NCSD and suppliers will no longer be required to provide information as stipulated above.

**For more information on registration, please:**

Mr. Thapelo Kgaphola on 011 688 7811

**To all Stake Holders****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 centralize the reporting of fraudulent and corrupt activities through the establishment of an independent fraud hotline. 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: 0800-0025-87 (all official languages)
- Email Address: [whistle@joburg.org.za](mailto:whistle@joburg.org.za)
- Walk in: 48 Ameshhof Street, SAPPI Building, East Wing, 5<sup>th</sup> Floor
- Social Media Pages: Facebook (Group Forensic and investigation services GFIS) and Twitter (@cojgfs)
- Management Request and referrals: Various Departments and Entities



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

**WE ENCOURAGE ALL PEOPLE DOING BUSINESS WITH US TO REPORT ANY CORRUPT OR ILLEGAL PRACTICE**

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**JOHANNESBURG DEVELOPMENT AGENCY**

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**MARCH 2025**

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**ANNEXURES**

- A : Business Declaration
- B : Declaration of Interest
- C : Declaration of Past SCM Practices
- D : MBD9 Certificate of Independent Bid Determination
- E : Declaration on state of municipal account
- F : Organogram
- G : POPI Act

**COPY OF ADVERT****TENDERING PROCEDURES****Tender Notice and Invitation to Tender****BID DESCRIPTION: RFP: PROJECT MANAGEMENT, AND ERP OPTIMISATION SERVICES FOR THE JDA FOR A PERIOD OF 12 MONTHS****CONTRACT NO: JDA/SAP/03-2025**

The JDA is requesting proposals from Service Providers for the provision of Project Management, ERP optimisation services to the JDA offices within the Bus Factory premises at 3 Helen Joseph Street, Newtown for a period of months.

Documents can be downloaded from the JDA website: [www.jda.org.za](http://www.jda.org.za) and e-Tenders portal [www.etenders.gov.za](http://www.etenders.gov.za) from **24 March 2025** and must only be downloaded from the stipulated websites only. The retyping of the tender document is not permitted.

Queries relating to the issue of these documents and procurement related issued may be addressed to Thapelo Kgaphola at Tel: (011) 688 7811; fax (011) 688 7899; or e-mail: [tkgaphola@jda.org.za](mailto:tkgaphola@jda.org.za)

Technical queries or queries relating to the project may be addressed to Mzwakhe Mokoena at (011) 688 7851; fax: (011) 688 7899; or E-mail: [Mzwakhemokoena@jda.org.za](mailto:Mzwakhemokoena@jda.org.za)

A Compulsory Clarification Meeting with representatives of the Employers will take place physically at the premises of Johannesburg Development Agency, The Bus Factory, 3 Helen Joseph Street, Newtown on the **27 March 2025** starting at **10H00 – 11H00**

**The closing time for receipt of tenders is 12:00 noon on 07 April 2025. Telegraphic, telephonic, telex, facsimile, e-mail and late tenders will not be accepted.**

Tenders must only be submitted on the tender documentation that is issued. The retyping of the tender document is not permitted.

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

The JDA's selection of qualifying tenders 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”.**

## 1. INTRODUCTION

The Johannesburg Development Agency (JDA) is requesting proposals from service providers for the provision of Project Management, and ERP optimisation services.

The appointment period envisaged is for 12 months. The JDA will welcome all proposals which will cover the requirements as set out in this documentation.

Proposals for this appointment are invited by public tender.

## 2. PROJECT INFORMATION

### 2.1 BACKGROUND

The JDA requires Project Management and ERP Optimisation services over a period of 12 months and therefore invites all interested service providers to submit their tenders to the JDA.

### 2.2 CONTRACT OBJECTIVES

The service provider resources must be SAP certified with at least 7 years of relevant experience in Project Management and ERP Optimisation services.

## 3. SCOPE OF WORK

The scope of work as specified below is intended to describe the general nature and level of work to be performed by the service provider for the SAP ECC 6.0 EHP 8 Functional and Technical Upgrade.

### 3.1 Project Management

The service provider will be required to perform the following project management tasks:

- Complete an initial assessment of the current SAP landscape.
- Provide a detailed work plans for the upgrade and optimisation to SAP ECC 6.0 EHP8 (Functional and Technical Upgrade).
- Project plan for implementing SAP ECC 6 EHP 8 should include the following phases
  - Preparation & Planning
  - Design & Blueprint
  - Upgrade Realisation and ERP Optimisation
  - Deployment
  - Go-Live Support
  - Post Go-Live Support
- Project Scope Management which includes ERP optimisation and integration requirements.
- Establish a Project Governance Framework
- Establish a Data Migration Approach and Plan
- Establish Test Policies including implementing adequate testing schedules.
- Establish a Project Quality Management approach and framework.
- Develop and execute on a Training Strategy and Plan.
- Provide a strategy for cut-over.
- Identify and address functional issues that may arise during the project.
- Provide the complete technical / functional blueprints and documentation for affected and new applications.

### 3.2 EHP 8 Technical Upgrade

- Establish and execute an upgrade strategy that will minimise business ICT risk.
- Efficient planning of overall changes within the SAP system landscape using Maintenance Planner, Maintenance Optimizer and/or similar SAP tools.

- Perform hardware sizing estimates for SAP ECC 6.0 EHP upgrade, optimisation and new applications
- Perform and Produce Landscape verification and Documentation.
- Perform SAP ECC 6.0 EHP Technical Upgrade services
- Test technical aspects including security, custom code and programs.
- Modify all custom reports/interface programs and all modified objects affected by the upgrade where applicable.

### **3.3 Functional Upgrade & Optimisation**

The functional upgrade, optimisation, enhancements and implementation approach to the JDA's SAP environment centers around SAP Enhancement Packages to bring new functionality to applications that improve business processes and optimise SAP utilization. For this project, the Functional SAP upgrade and Optimisation includes the following scope items:

- Business Process Optimisation
- Optimisation and Alignment of the SAP Financial Application, key focus areas to include:
  - SAP General Ledger
  - Accounts Payable
  - Accounts Receivable
  - Bank Accounting
  - Financial Asset Management
  - Management Accounting
- Optimisation of the SAP Project Systems Application
- Optimisation of the SAP Supply Chain Management Application.
- Optimisation of the SAP Funds Management Application
- Integration and alignment of the SAP Finance Application to other key ERP applications currently in use.
- Implementation of enhancement in accordance to upgraded applications and in accordance to optimisation requirements.
- Perform Data Migration activities where required.

## **4. APPOINTMENT**

The JDA is requesting proposals from companies with experienced and certified resources to provide Project Management and ERP Optimisation services to the JDA. The appointment will be over 12 Months.

The services required are outlined in item 2 above. This is followed by item 4.1 below which applicants are required to take note of.

### **4.1 Notes**

- 4.1.1 Applicants are to ensure that they have adequate resources to undertake the work under stringent timeframes.
- 4.1.2 Disputes shall be settled in good faith between parties in an effort to resolve the dispute. If the dispute is not resolved at that meeting, the Parties will attempt to settle it by mediation.
- 4.1.3 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.
- 4.1.4 Successful tenderers will be required to sign the JDA's Standard Form Agreement and appendices.
- 4.1.5 No tender will be awarded to a bidder whose tax matters are not in order with SARS.
- 4.1.6 No tender will be awarded to a bidder who is not registered on CSD.

## **5. PRICING NOTES**

Table below serves as a guide to pricing required from each bidder as follows.

- 5.1.1 Fees must include standard disbursements such as typing, reproduction, copying, binding of documents, telephonic / electronic and facsimile communications, courier, local travel and accommodation, etc.
- 5.1.2 **Tenderers must ensure that the final TOTAL FEE is correctly carried to the “offer” page. The value recorded on the offer page will be regarded as the tendered amount to render services. Failing to price as required will result in the tender being disqualified.**
- 5.1.3 Successful tenderers will be remunerated in accordance with JDA's Standard Form Agreement.
- 5.1.4 That the RFP will be evaluated in terms of PPR 2022.
- 5.1.5 That the RFP is issued out inline with the POPI ACT.

### Milestone based Pricing Template

The mandatory table based below must be completed by the service provider detailing Project Phases, Key Milestones and Fees:

| TELEPHONE UPGRADE SERVICES                      |                                                                            |                        |
|-------------------------------------------------|----------------------------------------------------------------------------|------------------------|
| Item                                            | DESCRIPTION                                                                | FEE<br>(excluding VAT) |
| 1.                                              | <b>PROJECT MANAGEMENT</b><br>As per the scope above. (3.1)                 | R                      |
| 2.                                              | <b>EHP 8 TECHNICAL UPGRADE</b><br>As per the scope above (3.2)             | R                      |
| 3.                                              | <b>FUNCTIONAL UPGRADE AND OPTIMIZATION</b><br>As per the scope above (3.3) | R                      |
| Total price excluding VAT                       |                                                                            |                        |
| VAT @15%                                        |                                                                            |                        |
| Total including VAT to be carried to Offer Page |                                                                            | R                      |

Tenderers are to replicate the above table and submit as part of their fee proposal.

**The Total must be carried over to the “Offer” page.**

**Failure to price as indicated above will lead to tenderers bids being disqualified.**

### 6. NOTES

- 6.1. 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, using numbered dividers.

The following minimum documentation must be provided:

- 6.2 THE “OFFER” PAGE MUST BE COMPLETED IN FULL AND SIGNED. Any bidder who fails to do so will be disqualified.

6.3 **Tenderers are required to submit a detailed fee in their proposal based on the requirements set out in item 5 above and to ensure that the final TOTAL FEE IS CORRECTLY TRANSFERRED TO THE “OFFER” PAGE. Any bidder who fails to do so will be disqualified.**

6.4 An original valid BBBEE status level verification certificate substantiating the bidding entities BBBEE rating or a certified copy thereof. 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.

An EME must submit a sworn affidavit confirming the following:

- **Annual turnover revenue of R10 million or less; and**
- **Level of black ownership**

Any misrepresentation in terms of the above constitutes a criminal offence as set out in the B-BBEE Act as amended.

6.5 Company registration documents.

6.6 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. A lease agreement will also suffice

6.7 Details of directors / partners / members and shareholders with certified copies of their identity.

6.9 A corporate brochure alternatively a brief summary of the entity's background.

6.10 Provide information on the individuals who will be assigned to this project (NOT the entire company). The following must be addressed:

- Organogram
- role/s and responsibility/ies on this project
- relevant qualifications and attach proof hereof
- number of years of relevant experience in the industry **and** in the proposed role
- detailed CV's for each member of the team noting their specific relevant project experience

6.11 **The service provider must provide proof that they are accredited as of SAP Certifications for its resources.**

***TENDERERS ARE TO SUBMIT 2 COPIES OF THEIR PROPOSAL (1 ORIGINAL PLUS 1 COPY).***

**FAILURE TO COMPLY WITH THE REQUIREMENTS IN ITEM 6 ABOVE WILL RESULT IN TENDERERS BEING DISQUALIFIED FOR NON-COMPLIANCE OR NEGATIVELY SCORED IN THE TECHNICAL ASSESSMENT.**

**Note for consortium and joint ventures**

- **EACH** party to a consortium and joint venture is to submit the requisite documents and / or information as requested in item 6
- An Agreement or Heads of Terms recording the arrangement between the parties to the consortium / joint venture is to be submitted.
- A lead consultant is to be appointed and noted in the submission.
- 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.**

## 7. ASSESSMENT CRITERIA

Submissions will be evaluated on the criteria to follow:

- Compliance
- Technical
- Price / BBEE
- Risk Tolerance

### 7.1 Compliance

Bidders' will be disqualified:

- 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 and the pricing table (i.e. priced, all registration numbers provided and signed);
- 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 fail to price as required i.e. as stipulated in item 5 herein,
- Bidders who failed to attend the compulsory tender briefing session,
- Bidders who have any directors that are in the employment of the state.
- No award will be made to any bidder who is not registered on the National Treasury Central Supplier Database (CSD),

### 7.2 Technical

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.

**Total points 240, Minimum points required 144 which is 60%.**

| (i). KEY RETURNABLE DOCUMENTS | Total Points | Criteria                                    | Description of criteria                                                                                                                                                                          | Points | Points |
|-------------------------------|--------------|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|--------|
| <b>Annexure A – G</b>         | <b>20</b>    | Valid BBEE status level certificate         | Points will only be allocated for key returnable documents submitted as required / stipulated in item 2.3 to 2.9 herein<br><br><b>Zero points will be awarded if Annexure G is not completed</b> | 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 completed in full and signed     |                                                                                                                                                                                                  | N/A    | Y / N  |
|                               |              | Annexure B completed in full and signed     |                                                                                                                                                                                                  | N/A    | Y / N  |
|                               |              | Annexure C completed in full and signed     |                                                                                                                                                                                                  | N/A    | Y / N  |

|                                                |              |                                                                                                                                       |                                                                                                                                  |        |       |
|------------------------------------------------|--------------|---------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|--------|-------|
|                                                |              | Annexure D completed in full and signed                                                                                               | JDA CV Template completed in full as prescribed<br><b>Points will not be allocated for referring to attached CV</b>              | N/A    | Y / N |
|                                                |              | Annexure E completed in full and signed                                                                                               |                                                                                                                                  | N/A    | Y / N |
|                                                |              | Annexure F completed in full and signed                                                                                               |                                                                                                                                  | 20     | 20    |
|                                                |              | Annexure G completed in full and signed                                                                                               |                                                                                                                                  | N/A    | N/A   |
| (ii). CAPABILITY OF THE PROPOSED KEY PERSONNEL | Total Points | Criteria                                                                                                                              | Description of criteria                                                                                                          | Points |       |
| PROJECT MANAGER                                |              |                                                                                                                                       |                                                                                                                                  |        |       |
| Experience                                     | 50           | <b>Project Manager:</b> Must have a minimum of 7 – 10 years hands-on relevant experience.                                             | CVs must show projects, roles played and period. If any information is not contained in the CV then zero points will be awarded  | 50     |       |
|                                                |              | <b>Project Manager:</b> Must have a minimum of 5 – 6 years hands-on relevant experience.                                              |                                                                                                                                  | 30     |       |
|                                                |              | <b>Project Manager:</b> Must have a minimum of 3 – 4 years hands-on relevant experience.                                              |                                                                                                                                  | 10     |       |
| Qualifications                                 | 20           | SAP certificate                                                                                                                       | Copies of Academic Qualifications                                                                                                | 20     |       |
|                                                | 10           | NQFL 7 (Finance, Information technology and Project Management)                                                                       | Copies of Academic Qualifications                                                                                                | 10     |       |
| SAP TECHNICAL                                  |              |                                                                                                                                       |                                                                                                                                  |        |       |
| Experience                                     | 25           | <b>SAP Technical:</b> Team Member must have a minimum of 6 – 8 years hands-on relevant experience.                                    | CVs must show projects, roles played and period. If any information is not contained in the CV, then zero points will be awarded | 25     |       |
|                                                |              | <b>SAP Technical:</b> Team Member must have a minimum of 3 - 5 years hands-on relevant experience. SAP certification to be attached.  |                                                                                                                                  | 15     |       |
| Qualifications                                 | 10           | SAP certificate                                                                                                                       | Copies of Academic Qualifications                                                                                                | 10     |       |
|                                                | 5            | NQFL 6 (Finance, Information technology)                                                                                              | Copies of Academic Qualifications                                                                                                | 5      |       |
| SAP FUNCTIONAL                                 |              |                                                                                                                                       |                                                                                                                                  |        |       |
| Experience                                     | 20           | <b>SAP Functional:</b> Team Member must have a minimum of 6 – 8 years hands-on relevant experience. SAP certification to be attached. | CVs must show projects, roles played and period. If any information is not contained in the CV then zero points will be awarded. | 20     |       |
|                                                |              | <b>SAP Functional:</b> Team Member must have a minimum of 3 - 5 years hands-on relevant experience.                                   |                                                                                                                                  | 15     |       |
| Qualifications                                 | 10           | SAP certificate                                                                                                                       | Copies of Academic Qualifications                                                                                                | 10     |       |
|                                                | 5            | NQFL 6 (Finance, Information technology and Project Management)                                                                       | Copies of Academic Qualifications                                                                                                | 5      |       |
| (iii) COMPANY EXPERIENCE                       | Total Points | Criteria                                                                                                                              | Description of criteria                                                                                                          | Points |       |

|                                                                                                       |              |                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |        |
|-------------------------------------------------------------------------------------------------------|--------------|-----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|
| Number of years of relevant experience in the industry and in the proposed role (complete Annexure F) | 50           | 5 Projects completed in SAP implementation and support and or SAP migration.            | Points will only be allocated for having rendered the required services on the review of the Annual Financial Statements                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 50     |
|                                                                                                       |              | 3 – 4 Projects completed in SAP implementation and support and or SAP migration.        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 30     |
|                                                                                                       |              | 1 – 2 Projects completed in SAP implementation and support and or SAP migration.        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 10     |
| (iv) REFERENCES FOR COMPLETED PROJECTS                                                                | Total Points | Criteria                                                                                | Description of criteria                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Points |
| To relate to the item (iv) above in line with (complete Annexure F)                                   | 15           | 5 and more references for projects in SAP implementation and support; and/or migration. | <b>References must be on client letterhead and must include the name / description of the project, it must confirm the service rendered, the value of the constructed works, the date completed and a comment of the level of satisfaction with the service. References must be for projects listed above under project experience, and relevant to this project only. Appointment letters, Purchase Orders etc. will NOT be considered as references.</b><br><br>If any of the required information is not contained in the reference, then zero points will be awarded | 15     |
|                                                                                                       |              | 3 to 4 references for projects in SAP implementation and support; and/or migration      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 10     |
|                                                                                                       |              | 1 to 2 references for projects in SAP implementation and support; and/or migration      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 5      |

### 7.3 Price and Empowerment

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

The 80/20 preference point system will apply to this tender and the lowest acceptable tender will be used to determine the applicable preference point system. The 80/20 price/preference points system will be applied to the evaluation of responsive tenders up to and including a Rand value of R50'000'000 (all applicable taxes included), whereby the order(s) will be placed with the tenderer(s) scoring the highest total number of adjudication points.

**Preference points shall be based on the Specific Goal as per below:**

Awards UP TO R50 mil (VAT Inclusive)

| The specific goals allocated points in terms of this RFQ            | Number of points allocated (80/20 system) (To be completed by the organ of state) | Evidence                                                                                                                                                                    |
|---------------------------------------------------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business owned by 51% or more – <b>Black/Indian/Coloured People</b> | <b>10</b>                                                                         | <ul style="list-style-type: none"> <li>Valid BBBEE certificate / Affidavit Sworn under oath' Company Registration Certification ' Certified copy of ID of owners</li> </ul> |
| SMMEs (An EME or QSE)                                               | <b>10</b>                                                                         | <ul style="list-style-type: none"> <li>Valid BBBEE Certificate/ Affidavit Sworn under oath' CSD report</li> </ul>                                                           |
| Total Points                                                        | <b>20</b>                                                                         | <b>Failure to attach evidence will lead to scoring zero points</b>                                                                                                          |

Notes:

The following formula will be used to calculate the points for price.

$$P_s = X \left[ 1 - \frac{(P_t - P_{min})}{P_{min}} \right]$$

Where

$P_s$  = Points scored for comparative price of tender under consideration

$P_t$  = Comparative price of tender under consideration

$P_{min}$  = Comparative price of lowest acceptable tender

$X$  = Points assigned to price

The total preference points for a tender are calculated with the formula

$$PP = P_s + P_{bee} \text{ Where}$$

$PP$  is the total number of preference points scored by the tenderer

$P_s$  is the points scored for the comparative price of the tenderer, and

$P_{bee}$  is the number of points awarded to the tenderer based on his certified B-BBEE status level

#### 7.4 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 is:

1. The greater of R 8million or four contracts / projects in the current financial year or

2. The greater of R12 million or six contracts / projects over two financial years (current year and previous financial year).

A risk analysis will also be undertaken on the tenderer having the highest ranking / number of points to ascertain if any of the following will not present any unacceptable commercial risk to the JDA in line with the JDA's risk tolerance framework;

- a) Unduly high or unduly low tendered rates, significant arithmetical errors and omissions in the tender offer;
- b) the tenderer has insufficient financial capability to perform the contract,
- c) total value and number of contracts awarded to a single contractor/service provider in a particular 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.

Bidders will be requested to attend an interview should there be a need for clarity.

## **8. CLOSING DATE, TIME AND VENUE FOR SUBMISSIONS**

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

### **RFP: PROJECT MANAGEMENT, ERP OPTIMISATION SERVICES FOR THE JDA FOR A PERIOD OF 12 MONTHS**

must be written / typed clearly on the envelope.

The envelope must be deposited in the tender box at the **Johannesburg Development Agency, Ground Floor, The Bus Factory, 3 Helen Joseph Street, Newtown** only between the hours of 08H00 and 17H00.

**The Tender closes at 12h00 on 07 April 2025**

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

### **NO LATE /NO EMAILED / 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:

Thapelo Kgaphola

E-mail: [Tkgaphola@jda.org.za](mailto:Tkgaphola@jda.org.za)

**ANNEXURE A : BUSINESS DECLARATION**

Tender/RFP Number : .....

Tender/RFP Description : .....

Name of Company : .....

Contact Person : .....

Postal Address : .....

Physical Address : .....

Telephone Number : .....

Fax Number : .....

Cell 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**

.....

.....

.....

3. Total number of years company 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. In the case of a firm which renders services for different disciplines, how many permanent staff members are employed by the firm in the discipline for which you are tendering:

Full Time : .....

Part Time : .....

8. What is the enterprise's annual turnover for the last three years and what is the estimated turnover of current commitments from 1 July 2022 to 30 June 2024 (excl. VAT):

R ..... Year.....

R ..... Year.....

R ..... Year.....

**9. Banking details**

I/We hereby request and authorise 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 authorised 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** : .....

**CONTACT PERSON** : .....

**CONTACT NUMBER** : .....

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** : .....

**COMPANY STAMP**

**ANNEXURE 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  
.....  
.....
  - 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**

.....

.....

.....

.....

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[illegible]

**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.**

.....  
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.

**ANNEXURE 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?<br><b>(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).</b>                                                                                                                       | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 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)?<br><b>(To access this Register enter the National Treasury's website, <a href="http://www.treasury.gov.za">www.treasury.gov.za</a>, 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).</b> | Yes<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.2.1 | If so, furnish particulars:                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                 |                                |
| Item  | Question                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Yes                             | No                             |
| 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<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.3.1 | If so, furnish particulars:                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                 |                                |

|  |  |
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|       |                                                                                                                                                                                                                                        |                                 |                                |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|--------------------------------|
| 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<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 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<br><input type="checkbox"/> | No<br><input type="checkbox"/> |
| 4.7.1 | If so, furnish particulars:                                                                                                                                                                                                            |                                 |                                |

### 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.

.....  
Signature

.....  
Position

.....  
Name of Bidder

.....  
Date

**ANNEXURE D : CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

---

*For*

**RFP: PROJECT MANAGEMENT, ERP OPTIMISATION SERVICES FOR THE JDA FOR A PERIOD OF 12 MONTHS**  
in response to the invitation for the bid made by:

*Johannesburg Development Agency*

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

I certify, on behalf of:

\_\_\_\_\_ that:  
(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign, the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
  - (a) has been requested to submit a bid in response to this bid invitation;
  - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
  - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraph 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - (a) prices;
  - (b) geographical area where product or service will be rendered (market allocation);
  - (c) methods, factors or formulas used to calculate prices;
  - (d) the intention or decision to submit or not to submit a bid;
  - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
  - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to

the date and time of the official bid opening or of the awarding of the contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No. 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No. 12 of 2004 or any other applicable legislation.

.....  
Signature

.....  
Position

.....  
Name of Bidder

.....  
Date

**ANNEXURE E: 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 F: ORGANOGRAM THIS ANNEXURE IS CRITICAL FOR THE TECHNICAL EVALUATION AS DETAILED UNDER ITEM 7.2 HEREIN**

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

**Project Manager**

| Table F-1.1 : Key Resource Information                                    |                 |
|---------------------------------------------------------------------------|-----------------|
| Resource Information                                                      |                 |
| Designation:                                                              | PROJECT MANAGER |
| Name & Surname                                                            |                 |
| Nationality                                                               |                 |
| ID / Passport Number                                                      |                 |
| First Qualification Name<br>Incl. Date of Qualification and Institution   |                 |
| Highest Qualification Name<br>Incl. Date of Qualification and Institution |                 |
| Years Experience after initial relevant Qualification                     |                 |
| Professional Registration Body / Institution                              |                 |
| Date of Professional Registration                                         |                 |
| Professional Registration Number                                          |                 |

**PROJECT MANAGER**

| Project Name | Project Type (similar to scope of RFQ) | Client Name & Contact Details | Specific Tasks completed by yourself |
|--------------|----------------------------------------|-------------------------------|--------------------------------------|
|              |                                        |                               |                                      |
|              |                                        |                               |                                      |
|              |                                        |                               |                                      |

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**Table F-1.2 : Key Resource Information**

| Resource Information                                                      |                      |
|---------------------------------------------------------------------------|----------------------|
| <b>Designation:</b>                                                       | <b>SAP TECHNICAL</b> |
| Name & Surname                                                            |                      |
| Nationality                                                               |                      |
| ID / Passport Number                                                      |                      |
| First Qualification Name<br>Incl. Date of Qualification and Institution   |                      |
| Highest Qualification Name<br>Incl. Date of Qualification and Institution |                      |
| Years Experience after initial relevant<br>Qualification                  |                      |
| Professional Registration Body /<br>Institution                           |                      |
| Date of Professional Registration                                         |                      |
| Professional Registration Number                                          |                      |

**SAP TECHNICAL**

| <b>Project Name</b> | <b>Project Type<br/>(similar to<br/>scope of RFQ)</b> | <b>Client Name &amp; Contact Details</b> | <b>Specific<br/>Tasks<br/>completed by<br/>yourself</b> |
|---------------------|-------------------------------------------------------|------------------------------------------|---------------------------------------------------------|
|                     |                                                       |                                          |                                                         |
|                     |                                                       |                                          |                                                         |
|                     |                                                       |                                          |                                                         |

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**Table F -1.3 : Key Resource Information**

| Resource Information                                                      |                       |
|---------------------------------------------------------------------------|-----------------------|
| <b>Designation:</b>                                                       | <b>SAP FUNCTIONAL</b> |
| Name & Surname                                                            |                       |
| Nationality                                                               |                       |
| ID / Passport Number                                                      |                       |
| First Qualification Name<br>Incl. Date of Qualification and Institution   |                       |
| Highest Qualification Name<br>Incl. Date of Qualification and Institution |                       |
| Years Experience after initial relevant<br>Qualification                  |                       |
| Professional Registration Body /<br>Institution                           |                       |
| Date of Professional Registration                                         |                       |
| Professional Registration Number                                          |                       |

**SAP FUNCTIONAL**

| <b>Project Name</b> | <b>Project Type (similar<br/>to scope of RFQ)</b> | <b>Client Name &amp; Contact Details</b> | <b>Specific Tasks<br/>completed by<br/>yourself</b> |
|---------------------|---------------------------------------------------|------------------------------------------|-----------------------------------------------------|
|                     |                                                   |                                          |                                                     |
|                     |                                                   |                                          |                                                     |

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**ANNEXURE G – POPI ACT**

## **Form B14: 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 Johannesburg Development Agency hereinafter referred to as “JDA”, 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 JDA 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 JDA requires relate to names and surnames, birth dates, identity numbers, passport numbers, demographic information, education information, occupation information, health information, addresses, memberships, personal and work email and contact details.

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

JDA 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
  - for a purpose that is ancillary to the above and as may be directed by our POPI manual/Policy.
- Personal information will not be processed for a purpose other than what is identified (the purpose) above without obtaining consent beforehand.

### **3. How will JDA process personal information?**

JDA will only collect personal information for the purpose as stated above and for such specific purpose. Information will be collected in the following manner:

- directly from the individual;
- from service providers who provided with services or goods to JDA;
- from JDA’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?**

JDA

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 (transborder 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 JDA'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 JDA to process the personal information provided for the purpose stated:

- I understand that withholding of or failure to disclose personal information will result in JDA being unable to perform its functions and/or any services or benefits I may require from JDA.
- Where I shared personal information of individuals other than myself with JDA, 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 JDA not responsible in respect of any claims by any other person on whose behalf I have consented, against JDA 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 JDA 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 JDA 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 JDA agrees to same in writing. JDA 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 JDA Information Officer/SCM
- A copy of the full JDA policy is available.
- Individuals are encouraged to ensure that where personal information has changed in any respect to notify JDA so that our records may be updated. JDA 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 JDA may have in its possession and are entitled to request the identity of which third parties have received and/or processed

JDA

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 JDA,
- 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 JDA's information officer and SCM in writing as soon as the breach is discovered.

|                   |       |
|-------------------|-------|
| Bidder Signature: | Date: |
|-------------------|-------|