

REQUEST FOR QUOTATION

| | |
|--|--|
| YOU ARE HEREBY INVITED TO SUBMIT QUOTATIONS FOR THE REQUIREMENTS OF: APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF PARTNERSHIP SPECIALIST SERVICES | |
| RFQ REFERENCE: | Re-issue RFQ – GEP PARTNERSHIP SPECIALIST SERVICES |
| CLOSING DATE AND TIME: | 8 th July 2025 at (11:00) am |
| RFQ VALIDITY PERIOD | 30 days (Commencing from the RFQ closing date) |
| DESCRIPTION | <p>Specification Description:</p> <p>To design, coordinate, and implement a partnership-driven fundraising strategy that will expand GEP's funding base, deepen institutional partnerships, and drive programmatic co-investment aimed at enhancing support for SMMEs.</p> <p>NB: Those that submitted by closing date and time need not resubmit.</p> <p>Refer to Terms of Reference</p> <p>NB: No physical bids will be accepted</p> |
| E-MAIL ADD. FOR SUBMISSION OF QUOTES | scm@gep.co.za |
| ENQUIRY | scm@gep.co.za |
| Name of Service Provider: | |
| CSD MA number: | |
| Signature: | |
| Date of submission of quotation: | |

Notes:

1. Bidders must put Name of the bidder, CSD MA number, sign and put submission date on RFQ above;
2. Complete supporting SBD documents and submit required with their response and BEE certificate / Sworn Affidavit signed by Commissioner of Oath.
3. Only bidders registered on the Central Supplier Database(CSD) will be considered for evaluation.
4. All quotation received after closing time and date will not be considered.

BIDDER:.....

REGISTRATION NUMBER:.....

ADDRESS:.....

.....

PERSON:.....

TEL:.....

TERMS AND CONDITIONS OF REQUEST FOR QUOTATION (RFQ)

1. GEP standard conditions of purchase shall apply.
2. GEP reserves the right to negotiate with service providers
3. GEP reserves the right not to procure the goods and/or services.
4. Late and incomplete submissions will not be accepted.
5. Any bidder who has reasons to believe that the RFQ specification is based on a specific brand must inform the GEP before RFQ closing date.
6. Bidders are required to submit BBBEE Certificate or SWORN Affidavit for all price quotations
7. It is the responsibility of the bidder to ensure that GEP is in possession of the bidder's valid BBBEE. The onus is on the bidder to ensure that the GEP receives a valid BBBEE as soon as the validity of the said certificate expires.
8. No services must be rendered or goods delivered before an official GEP Purchase Order form has been received, except in an emergency situation.
9. This RFQ will be evaluated in terms of the 80/20 system prescribed by the Preferential Procurement Regulations, 2022.
10. Bidders are required to complete all the Annexures
11. Bidders, where applicable, are required to attach all relevant qualifications, experiences in the public sector and references.

I, the undersigned (NAME).....certify
that :

- i. I have read and understood the conditions of this RFQ.
- ii. I have supplied the required information and the information submitted as part of this RFQ is true and correct.

ANNEXURE B:

**PART A
INVITATION TO BID**

| | | | | | | | |
|--|--|---------------|--|--|--|--|--|
| YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY) | | | | | | | |
| BID NUMBER: | | CLOSING DATE: | | | CLOSING TIME: | | |
| DESCRIPTION | | | | | | | |
| BID RESPONSE DOCUMENTS TO BE EMAIL TO scm@gep.co.za | | | | | | | |
| BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO | | | | TECHNICAL ENQUIRIES MAY BE DIRECTED TO: | | | |
| CONTACT PERSON | | | | CONTACT PERSON | | | |
| TELEPHONE NUMBER | | | | TELEPHONE NUMBER | | | |
| FACSIMILE NUMBER | | | | FACSIMILE NUMBER | | | |
| E-MAIL ADDRESS | | | | E-MAIL ADDRESS | | | |
| SUPPLIER INFORMATION | | | | | | | |
| NAME OF BIDDER | | | | | | | |
| POSTAL ADDRESS | | | | | | | |
| STREET ADDRESS | | | | | | | |
| TELEPHONE NUMBER | CODE | | NUMBER | | | | |
| CELLPHONE NUMBER | | | | | | | |
| FACSIMILE NUMBER | CODE | | NUMBER | | | | |
| E-MAIL ADDRESS | | | | | | | |
| VAT REGISTRATION NUMBER | | | | | | | |
| SUPPLIER COMPLIANCE STATUS | TAX COMPLIANCE SYSTEM PIN: | | OR | CENTRAL SUPPLIER DATABASE No: | MAAA | | |
| B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE | TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No | | B-BBEE STATUS LEVEL SWORN AFFIDAVIT | | [TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| [A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE] | | | | | | | |
| ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF] | | ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED? | | <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW] | | |
| QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS | | | | | | | |
| IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? | | | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE A BRANCH IN THE RSA? | | | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA? | | | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA? | | | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION? | | | | | <input type="checkbox"/> YES <input type="checkbox"/> NO | | |
| IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW. | | | | | | | |

PART B**TERMS AND CONDITIONS FOR BIDDING**

| | |
|---------------------------------------|---|
| 1. BID SUBMISSION: | |
| 1.1. | BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT EMAIL ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION. |
| 1.2. | ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED–(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT. |
| 1.3. | THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2022, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT. |
| 1.4. | THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7). |
| 2. TAX COMPLIANCE REQUIREMENTS | |
| 2.1 | BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS. |
| 2.2 | BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS. |
| 2.3 | APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA . |
| 2.4 | BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID. |
| 2.5 | IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER. |
| 2.6 | WHERE NO TCS IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED. |
| 2.7 | NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE." |

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

CAPACITY UNDER WHICH THIS BID IS SIGNED:
(Proof of authority must be submitted e.g. company resolution)

DATE:

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-

- the bidder is employed by the state; and/or
- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

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

- 2.1 Full Name of bidder or his or her representative:

.....

- 2.2 Identity

Number:.....

- 2.3 Position occupied in the Company (director, trustee, shareholder², member):

.....

- 2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:

.....

- 2.5 Tax Reference Number:

.....

- 2.6 VAT Registration Number:

.....

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹“State” means –

- (a) 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);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

² “Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder **YES / NO**
presently employed by the state?

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

.....

Name of state institution at which you or the person
connected to the bidder is employed:

.....

Position occupied in the state institution:

.....

Any other particulars:

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

2.7.2 If you are presently employed by the state, did you obtain **YES / NO**
the appropriate authority to undertake remunerative
work outside employment in the public sector?

2.7.2.1 If yes, did you attach proof of such authority to the bid **YES / NO**
document?

(Note: Failure to submit proof of such authority, where
applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

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

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?

2.8.1 If so, furnish particulars:

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

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?

YES / NO

2.9.1 If so, furnish particulars.

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

2.10 Are you, or any person connected with the bidder, aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

YES/NO

2.10.1 If so, furnish particulars.

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

2.11 Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

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

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

| Full Name | Identity Number | Personal Tax Number | Income Reference | State Employee Number / Persal Number |
|-----------|-----------------|---------------------|------------------|---------------------------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

certify that the information furnished in paragraphs 2 and 3 above is correct.

i accept that the state may reject the bid or act against me should this declaration prove to be false.

.....
Signature

.....
Date

.....
Position

.....
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

1.2 To be completed by the organ of state

- a) The applicable preference point system for this tender is the **80/20** preference point system.
- b) The **80/20 preference point system** will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 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.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

| | POINTS |
|--|---------------|
| PRICE | 80 |
| SPECIFIC GOALS | 20 |
| Total points for Price and SPECIFIC GOALS | 100 |

1.5 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.

- (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).

3.1. POINTS AWARDED FOR PRICE

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

$$P_S = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right) \text{ or } P_S = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmin = Price of lowest 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) 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 organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: REFER TO TERMS OF REFERENCE

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

[CIRCLE APPLICABLE]
- 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:

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HEAD OFFICE 6th Floor, 124 Main Street, Johannesburg, 2107 | Telephone: 011 085 2001 | Fax: 011 388 4010 | Website: www.gep.co.za

- 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 *audialteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....

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Annexure E: POPIA ACT CONSENT FORM:

Consent form in terms of section 11 of the Protection of Personal Information Act No 4 of 2013 (POPIA)

In order for the Gauteng Enterprise Propeller (GEP) to consider the bidder's response to the RFQ / RFP to become a service provider of the GEP, it will be necessary for the GEP to process certain personal information which the service provider may share with GEP for the purpose of the RFQ / RFP, including personal information, which may include special personal information (all hereafter referred to as "Personal Information")

The GEP will process the Service Provider's Personal Information in accordance with the GEP Privacy Policy.

Access to your Personal Information and purpose specification

Personal Information will be processed by GEP for purposes of assessing the service provider's submission in relation to the RFQ / RFP i.e. the purposes of assessing current services required by the GEP. We may also share the service provider's Personal Information with third parties, both within the Republic of South Africa and in other jurisdictions, including to carry out verification, background checks and Know Your Customer obligations in terms of the Financial Intelligence Centre Act, No. 38 of 2001 ("FICA"). In this regard, the service provider acknowledges that GEP's authorised verification agent(s) and service providers will access Personal Information and conduct background screening.

Consent

By [ticking/clicking] "Yes" and signing below, you agree and voluntarily consent to the GEP's processing of the service provider's Personal Information for the purposes of evaluating its RFQ / RFP submission, including to confirm and verify any information provided in the submission and service provider gives GEP permission to do so. The service provider understands that it is free to withdraw its consent on written notice to GEP and the service provider agrees that the Personal Information may be disclosed by the GEP to third parties, including GEP's affiliates, service providers and associates (some of which may be located outside of the Republic of South Africa). Please note that if you withdraw your consent at any stage, we may be unable to process your RFQ / RFP.

Yes ☐

No ☐

Supplier Name

Date

Signature

Authorised representative, who warrants that he/she is duly authorised.

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TERMS OF REFERENCE: PARTNERSHIP SPECIALIST SERVICES

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1. Background

The Gauteng Enterprise Propeller (GEP), a Schedule 3C public entity, is mandated to support the growth and sustainability of Small, Medium, and Micro Enterprises (SMMEs) in Gauteng. In pursuit of its strategic goals and to expand developmental impact, GEP recognizes the importance of strategic partnerships to unlock alternative funding avenues, enhance programme delivery, and co-create value with aligned stakeholders. The Terms of Reference defines the role of a SMME and Partnership Specialist to lead, coordinate, and implement partnership-driven fundraising initiatives.

2. Purpose

To design, coordinate, and implement a partnership-driven fundraising strategy that will expand GEP's funding base, deepen institutional partnerships, and drive programmatic co-investment aimed at enhancing support for SMMEs.

3. Objectives

The key objectives of the assignment are to:

1. Identify and profile potential strategic partners (corporates, DFIs, NGOs, academia, municipalities, international donors, etc.) aligned to GEP's mandate.
2. Develop a fundraising strategy leveraging partnerships to access alternative funding opportunities.
3. Design and execute partnership engagement plans aimed at relationship building and co-investment.
4. Create mutual value frameworks for GEP and its partners.
5. Implement structured communication and collaboration models with partners.
6. Monitor, evaluate, and report on the effectiveness and financial impact of partnerships on GEP's fundraising efforts.

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4. Scope of Work

The appointed specialist will undertake the following activities:

4.1. Partnership Identification & Due Diligence

- Conduct market intelligence and stakeholder mapping to identify high-value potential partners.
- Profile and assess the strategic fit of potential funding or implementation partners.

4.2. Fundraising Through Partnerships

- Identify and unlock local and international funding opportunities through co-funding models, PPPs, and development finance.
- Prepare compelling value propositions and co-investment cases.

4.3. Strategic Plan Development

- Draft a Strategic Partnership and Fundraising Plan in alignment with GEP's Annual Performance Plan (APP) and Provincial Economic Development Strategy.
- Define partnership tiers, risk management protocols, and key performance metrics.

4.4. Stakeholder Engagement and Relationship Management

- Facilitate structured engagements with identified partners.
- Coordinate stakeholder forums, roundtables, and co-creation workshops.

4.5. Collaboration Frameworks and Agreements

- Draft Memoranda of Understanding (MoUs), Cooperation Agreements, and Joint Funding Frameworks.
- Provide inputs into SLAs ensuring shared objectives and compliance.

4.6. Monitoring and Evaluation (M&E)

- Develop and implement a Partnerships Impact Dashboard to track funding raised, partnerships formed, and outcomes for SMMEs.
- Produce quarterly progress reports and an end-of-term evaluation.

JOHANNESBURG OFFICE

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5. Deliverables

The Specialist will be expected to deliver the following:

| Deliverable | Description | Timeline |
|------------------------------------|---|-------------|
| 1. Stakeholder Mapping Report | A comprehensive map of potential local and international partners and donors. | Month 1 |
| 2. Fundraising Strategy Document | Strategic framework identifying funding mechanisms, targets, engagement methods. | Month 2 |
| 3. Partnership Engagement Plan | Customised engagement plans for each identified tier of partners. | Month 2 |
| 4. Draft Agreements & MoUs | Standard templates and at least 5 signed agreements by end of project term. | Ongoing |
| 5. Partnership Dashboard | Real-time tool to track partnerships, funds raised, and SMME impact. | Month 3 |
| 6. Quarterly Progress Reports | Reports measuring partnership success, financial inflows, and SMME support expansion. | Quarterly |
| 7. Final Project Report & Handover | A full wrap-up report including lessons learned, risks and sustainability plan. | Final Month |

6. Duration and Reporting

- The assignment will run for a period of 6 months.
- The Specialist will report to the Chief Financial Officer subject to CEO ad-hoc requests at GEP.
- Bi-weekly check-ins and monthly review meetings are expected.

7. Required Qualifications and Experience

- Bachelor's degree in Business, Development Finance, Economics, or related field (Master's preferred).
- Minimum 5 years' experience in any of the following below (inclusive of Stakeholder management)
 - Fundraising or public-private partnerships.
 - Finance business partnering
- Experience working with SMMEs or in a development finance institution is advantageous.

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| Functionality Criteria | Description | Weight |
|---|---|------------------|
| Proposed personnel relevant qualifications: Qualification in Business, Development Finance, Economics, or related field (Attach proof of qualifications). Foreign qualifications to be submitted with SAQA verification certificate | <ul style="list-style-type: none"> • Master = 10 points • Honors = 7 points • Degree = 5 points • Non-submission = 0 points | 10 points |
| Bidder Technical Experience: Bidders will be evaluated on their experience in Business finance partnering or fundraising or public-private partnerships. | Bidder has completed more than 8 relevant and similar projects. = 30 points Bidder has completed 4 - 7 relevant and similar projects. = 20 points Bidder has completed 2 - 3 relevant and similar projects. = 10 points Bidder has completed 0 -1 relevant and similar projects. = 0 points | 10 points |
| Methodology and interpretation of requirements: Bidders will be evaluated on their demonstrable understanding of the assignment and methodology for identifying and establishing partnerships and to allow GEP to be self-funded <ul style="list-style-type: none"> • Funding Strategy and Fundraising implementation Plan Innovative and Cost-Efficient Funding Approach: <ul style="list-style-type: none"> • Demonstrates the use of creative, feasible strategies to identify and mobilize funding from diverse sources. • Emphasis on leveraging non-traditional and innovative funding mechanisms. Understanding of Organizational Context <ul style="list-style-type: none"> • Strong grasp of the organization's activities, programs, and the needs of beneficiary communities. | <ul style="list-style-type: none"> • The approach is innovative and likely to result in feasible and cost-efficient funding. The methodology has specifically indicated methods of identification of innovative funding sources and mobilising finance from various sources. • The approach has demonstrated understanding of the entity's activities and programmes and beneficiary communities; and an ability to interpret this understanding and knowledge into effective fundraising communications • Clear timeliness, required information and deliverables have been highlighted. The work plan fits the project deliverables well; all important activities are indicated and are very well defined= 30 points • Approach is specifically tailored to suit the requirements and will meet the needs of the assignment. | 30 points |

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| | | |
|---|--|-------------------------|
| <ul style="list-style-type: none"> Ability to translate this understanding into compelling, targeted fundraising communications and partnership proposals. <p>Strategic Planning and Execution</p> <ul style="list-style-type: none"> Clearly defined work plan aligned with project objectives and deliverables. Timely execution of tasks with all required activities, timelines, and deliverables well-structured and realistically planned. <p>Effective Communication and Engagements</p> <ul style="list-style-type: none"> Capacity to engage diverse stakeholders and build strategic, value-driven partnerships. Skilled in aligning partner interests with organizational goals for mutual benefit. | <ul style="list-style-type: none"> The approach has demonstrated understanding of the proposed GEP activities and programmes and beneficiary communities; and an ability to interpret this understanding and knowledge into effective fundraising communications The work plan and timeframes meet the requirements of the assignment; the sequencing of activities indicate the bidder understands the requirements. The work plan fits the project deliverables well; all important activities are indicated and consistent with project objectives and requirements. There is a fair degree of detail that facilitates understanding. = 20 | |
| <p>Proposed personnel relevant experience and qualifications:</p> <p>Bidders will be evaluated on their proposed personnel experience:</p> <p>(Attach detailed CVs and proof of qualifications).</p> | <ul style="list-style-type: none"> Approach is generic. The activity schedule meets the requirements of the assignment. The bidder has provided a description of the policies and procedures in terms of project scope. = 10 | |
| | <p>Non-submission or proposal does not address the scope of the assignment = 0</p> | |
| | <p>The proposed personnel is highly experienced and has established successful fund generating partnerships</p> <p>Completed more than five fund generating partnerships. This should include at least 6 funded projects = 30 points</p> <p>The team is composed of personnel with satisfactory relevant experiences in fund generating partnerships and who have completed 3-5 fund raising projects. This should include at least 3 funded projects =20 points</p> | <p>30 points</p> |

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|--|--|-------------------|
| | The team is composed of personnel with limited relevant experiences in fund generating partnerships and who have completed 1-2 funded projects. =10 points | |
| | No relevant experience in fund generating partnerships = 0 | |
| Reference letters detailing the below | 6 or more references with satisfactory performance = 20 points | 20 points |
| Client organisation and contract details (Contract Number, Title, Description, Value, Period of Performance, contact details, signed letter) | 3 - 5 references with satisfactory performance = 16 points | |
| | 2 references with satisfactory performance = 8 points | |
| Brief description of Bidder's responsibilities and services offered | 1 reference with satisfactory performance = 4 points | |
| Bidder's role in the assignment | No reference provided = 0 points | |
| Total | | 100 points |
| Bidders will be required to score a minimum of 70% of the total score to proceed to the second stage price and preference points | | |

Table 1: Specific goals for the tender and points claimed are indicated per the table below. The 80/20 preference point system is applicable, corresponding points

| The specific goals allocated points in terms of this tender | Number of points allocated(80/20 system) (To be completed by the organof state) |
|---|--|
| Bidder must also submit the following Proof of evidence to claim the allocated points: | |
| Youth Ownership – certified copy of B-BBEE certificate or valid Sworn Affidavit/ CIPC documents/ ID copy | |
| Woman Ownership – certified copy of B-BBEE certificate or valid Sworn Affidavit/ CIPC documents/ ID copy | |
| Black Owned certified copy of B-BBEE certificate or valid Sworn Affidavit/ CIPC documents/ ID copy | |
| NOTE: Submitted information will be verified through various platforms. | |
| Black owned (requirement is 51 %+ ownership) | 12 |
| Women owned (requirement is 51 %+ ownership) | 4 |
| Youth owned (requirement is 51 %+ ownership) | 4 |

Enquiries: scm@gep.co.za

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