SBD 1: PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH MARITIME SAFETY AUTHORITY					
RFQ NUMBER:	RFQ-HO-1835	ISSUE DATE CLOSING DATE	09 / 11/ 2026 19/ 11/ 2026	CLOSING TIME:	11h00
DESCRIPTION	**(WHISTLEBLOWING SERVICES)** **Refer to annexure A for detailed specification**				
BRIEFING SESSION (If applicable)	**N/A**				
DELIVERY ADDRESS	SAMSA PRETORIA, 146 LUNNON ROAD, HILLCREST, PRETORIA				
VALIDITY PERIOD	**Price quoted should remain valid for at least sixty (60) days after the closing date.**				
ALL BID RESPONSE DOCUMENTS MUST BE EMAILED TO:					
rfqresponses@samsa.org.za **(EMAIL SUBJECT LINE MUST CLEARLY INDICATE THE RFQ NUMBER)**					
BIDDING PROCEDURE AND TECHNICAL ENQUIRIES MAY BE DIRECTED TO:					
CONTACT PERSON	**NOMFUNDO MJI**				
TELEPHONE NUMBER	**012 366 2600**				
E-MAIL ADDRESS	nmji@samsa.org.za				
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	TAXCOMPLIANCE SYSTEM PIN:	**OR**	CENTRAL SUPPLIER DATABASE No: MAAA		
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	☐Yes ☐No [IF YES ENCLOSE PROOF]	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		☐Yes ☐No IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				☐ YES ☐ NO	

DOES THE ENTITY HAVE A BRANCH IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?	☐ YES ☐ NO
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?	☐ YES ☐ NO
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?	☐ YES ☐ 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.

SBD 1: PART B

TERMS AND CONDITIONS FOR BIDDING

1.	BID SUBMISSION:
1.1.	BIDS MUST BE EMAILED / DELIVERED BY THE STIPULATED TIME TO THE CORRECT 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, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4.	THE SUCCESSFUL BIDDER MAY BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7), FOR LONG TERM CONTRACTS / OR WERE DEEMED NECESSARY.
1.5.	PROSPECTIVE BIDDERS MUST CONSIDER THE SPECIFICATION & ADDITIONAL SUPPORTING DOCUMENTATION WHEN RESPONDING.
1.6.	ALL INFORMATION SUBMITTED AS EVIDENCE MUST BE CONSISTENT WITH DECLARATIONS MADE TO BE AWARDED POINTS. INCONSISTENT INFORMATION PROVIDED MAY RESULT IN 0 POINTS AWARDED FOR THE APPLICABLE GOAL/S.
1.7.	FORMER EMPLOYEES, BOARD/COMMITTEE MEMBERS, WHO HAVE TERMINATED EMPLOYMENT /SERVICES WITH SAMSA SHALL NOT BE CONSIDERED FOR BIDDING OR SUBMITTING QUOTATIONS COMPETING FOR SAMSA BIDS / REQUEST FOR QUOTATIONS (RFQS) UNTIL A PERIOD OF 24 MONTHS FROM THE END DATE OF THE CERTIFICATE OF SERVICE OR EMPLOYMENT CONTRACT WITH SAMSA HAS ELAPSED.
1.8.	FORMER EMPLOYEES WHO HAVE BEEN DISMISSED FROM THE EMPLOYMENT OF SAMSA SHALL BE PROHIBITED FROM DOING BUSINESS WITH SAMSA FOR A PERIOD OF FIVE (5) YEARS FROM THE DATE OF DISMISSAL.
1.9.	SAMSA SHALL USE THE LATEST STANDARD BIDDING DOCUMENT (SBD) OR ANY OTHER RELEVANT INFORMATION WHEN INVITING BIDS AND TO VERIFY THE IDENTITY NUMBERS OF THE DIRECTORS/TRUSTEES/SHAREHOLDERS OF THE PREFERRED BIDDER(S) AGAINST THE INSTITUTION'S STAFF ESTABLISHMENT IN ORDER TO DETERMINE WHETHER OR NOT ANY OF THE DIRECTORS/TRUSTEES/SHAREHOLDERS ARE IN THE SERVICE OF THE STATE OR OFFICIALS EMPLOYED BY THE SPECIFIC INSTITUTION OR FOUND TO BE DISCREDITED UNDER THE LAW.
1.10.	SAMSA RESERVES THE RIGHT TO DISQUALIFY BIDDERS WITH SUPPORTING DOCUMENTS THAT ARE NOT DULY SUBMITTED IN TERMS OF THE BID CONDITIONS.
1.11.	DELIVERY COSTS IN THE QUOTATION WILL NOT BE CONSIDERED SEPARATELY, BUT RATHER AS PART OF THE TOTAL QUOTATION DURING THE EVALUATION.
1.12.	IN THE EVENT OF ANY DISCREPANCY OR INCONSISTENCY BETWEEN THE PRICE SUBMITTED BY A BIDDER IN THE PRESCRIBED PRICING SCHEDULE CONTAINED IN THE SBD AND THE PRICE REFLECTED IN ANY SEPARATE QUOTATION OR SUPPORTING PRICING DOCUMENT SUBMITTED BY THE BIDDER, THE PRICE CONTAINED IN THE PRESCRIBED PRICING SCHEDULE IN THE SBD SHALL PREVAIL, PROVIDED THAT THE BID DOCUMENT EXPRESSLY STIPULATES THAT THE PRESCRIBED PRICING SCHEDULE IS THE GOVERNING PRICING DOCUMENT.
1.13.	WHERE A BIDDER HAS NOT PROVIDED PRICING FOR A REQUIRED LINE ITEM, THE BEC SHALL VERIFY THE OMISSION AGAINST THE PRESCRIBED PRICING SCHEDULE AND THE REQUIREMENTS OF THE BID DOCUMENT. WHERE IT IS CONFIRMED THAT THE LINE ITEM WAS REQUIRED TO BE PRICED AND NO PRICE HAS BEEN PROVIDED, THE BID MAY BE REGARDED AS INCOMPLETE AND NON-RESPONSIVE FOR FAILURE TO PRICE THE FULL REQUIRED SCOPE
1.14.	BIDDERS MAY INCLUDE ADDITIONAL LINE ITEMS, COSTS, OR PRICING COMPONENTS NOT EXPRESSLY LISTED IN THE PRESCRIBED PRICING SCHEDULE WHERE THESE ARE NECESSARY TO PROVIDE A COMPLETE AND COMPREHENSIVE PRICE FOR THE FULL SCOPE OF THE BID. THE INCLUSION OF SUCH ADDITIONAL ITEMS DOES NOT REMOVE THE REQUIREMENT FOR BIDDERS TO PROVIDE PRICING FOR EACH LINE ITEM CONTAINED IN THE PRESCRIBED PRICING SCHEDULE. WHERE A BIDDER FAILS TO PROVIDE PRICING FOR A LINE ITEM CONTAINED IN THE PRESCRIBED

PRICING SCHEDULE, AND THE OMISSION RESULTS IN THE FULL SCOPE NOT BEING PRICED, THE BID MAY BE REGARDED AS INCOMPLETE AND NON-RESPONSIVE.

1.15. ANY QUALIFICATIONS, CONDITIONS, EXCLUSIONS OR DEVIATIONS INTRODUCED BY A BIDDER IN ITS PROPOSAL OR SUPPORTING DOCUMENTATION SHALL NOT BE DEEMED ACCEPTED BY SAMSA MERELY THROUGH RECEIPT OR EVALUATION OF THE BID. SAMSA IS NOT OBLIGATED TO IDENTIFY OR SEEK CLARIFICATION ON SUCH CONDITIONS UNLESS SPECIFICALLY RAISED DURING THE PRESCRIBED CLARIFICATION PROCESS AND EXPRESSLY ACCEPTED BY SAMSA IN WRITING. BIDDERS REMAIN RESPONSIBLE FOR ENSURING THAT THEIR SUBMISSIONS COMPLY WITH THE SCOPE OF WORK, TERMS OF REFERENCE AND ALL BID REQUIREMENTS.

1.16. SAMSA MAY APPLY OBJECTIVE CRITERIA, AS PERMITTED UNDER SECTION 2(1)(F) OF THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT (ACT 5 OF 2000), WHERE SUCH CRITERIA JUSTIFY AN AWARD THAT DIFFERS FROM THE OUTCOME OF THE PREFERENCE POINT SYSTEM.

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 PIN 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.

TOTAL BID PRICE (INCLUDING VAT)	
SIGNATURE OF BIDDER	
DATE	

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

SBD 4: BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest1 in the enterprise, employed by the state?
YES/NO

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

……

……

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

……
……

3 DECLARATION

I, the undersigned, (name)…… in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read, and I understand the contents of this disclosure.

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect.

3.3 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 consortium1 will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements, or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.5 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.

3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.7 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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT. I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	.....
Signature	Date
.....	.....
Position	Name of bidder

SBD 6.1

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to bid:
- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 Either the 90/10 or 80/20 preference point system will be applicable in this bid. The lowest/ highest acceptable bid will be used to determine the accurate system once bids are received.

1.3 Points for this bid (even in the case of a bid for income-generating contracts) shall be awarded for:
(a) Price; and
(b) Specific Goals.

1.4 The preference point system application must not exceed 100 and must be applied as per below:
1.4.1 The 80/20 preference system:

The maximum points for this bid are allocated as follows:

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

** Point allocation break down provide below

1.4.1.1 SPECIFIC GOALS: 80/20

SPECIFIC GOAL	Points
Goal 1: Historically Disadvantaged Individuals (14)	
a) who had no franchise in national elections before the 1983 and 1993 Constitutions	**7**

b) who is a female c) who has a disability	**5** **2**
Goal 2: who is youth	**3**
Goal 3: Locality	**3**
TOTAL	**20**

1.4.2 The 90/10 preference system:
The maximum points for this bid are allocated as follows:

	POINTS
PRICE	90
SPECIFIC GOALS**	10
Total points for Price and SPECIFIC GOALS	**100**

** Point allocation break down provide below

1.4.2.1 SPECIFIC GOALS: 90/10

SPECIFIC GOAL	**Points**
Goal 1: Historically Disadvantaged Individuals (7) a) who had no franchise in national elections before the 1983 and 1993 Constitutions b) who is a female c) who has a disability	 **4** **2** **1**
Goal 2: who is youth	**1**
Goal 3: Locality	**2**
TOTAL	**10**

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

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

2. DEFINITIONS

(a) **"locality"** means the promotion of SMMEs located within the specific area;
(b) **"bid"** 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 bidding process or any other method envisaged in legislation;
(c) **"price"** means an amount of money bided for goods or services, and includes all applicable taxes less all unconditional discounts;
(d) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
(e) **"bid 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 SAMSA and a third party that

produces revenue for SAMSA, 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

(f) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20 or 90/10

$$Ps = 80\left(1 - \frac{Pt-P}{P}\right) \quad \text{or} \quad Ps = 90\left(1 - \frac{Pt-P}{P}\right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmin = Price of lowest acceptable bid

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20 or 90/10

$$Ps = 80\left(1 + \frac{Pt-P}{P}\right) \quad \text{or} \quad Ps = 90\left(1 + \frac{Pt-P}{Pmax}\right)$$

Where

Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmax = Price of highest acceptable bid

4. POINTS AWARDED FOR SPECIFIC GOALS

The preferential procurement point system applicable for this bid is:

Preferential Point System	Mark
80/20	X
90/10	

4.1. Specific goals for the bid and points claimed are indicated per the table below: 80/20 preference system.

4.1.1. EQUITY OWNERSHIP CLAIMED IN TERMS OF PARAGRAPH 1.4

	SPECIFIC GOAL (SUPPORTING DOCUMENTS FOR VERIFICATION)	Maximum points that can be scored	Points being claimed by supplier
	Equity ownership **by persons who** had no franchise	7	

HDI	in the national elections. (ID copies of ALL listed owner/s, as per the CSD, CK1 registration document (CIPC), BBBEE certificate)		
	Equity ownership **by women** **(**ID copies of ALL listed owner/s, BBBEE certificate)	5	
	Equity ownership **by disabled persons** **(**Medical certificate/ Assessment)	2	
	Equity ownership **by youth** **(**ID copies of ALL listed owner/s, BBBEE certificate)	3	
	Locality (CIPC / SARS or valid proof of address utility bill, bank statement, account statement, municipal councillor's letter)	3	
	TOTAL	20	

** Claimed points can only be allocated where supporting documents have been provided.
** Ownership points will be awarded on a pro-rata using share certificates / CSD / SBD
** Specific goal points are allocated to natural persons and will be awarded in accordance with company/ consortium or joint venture ownership allocation
** Locality goal points will only be awarded to suppliers within the province of delivery
** Refer to checklist attached to ensure correct document submission

4.2. Specific goals for the bid and points claimed are indicated per the table below: 90/10 preference system.

4.2.1. EQUITY OWNERSHIP CLAIMED IN TERMS OF PARAGRAPH 1.4

	SPECIFIC GOAL **(SUPPORTING DOCUMENTS FOR VERIFICATION)**	**Maximum points that can be scored**	**Points being claimed by supplier**
HDI	Equity ownership **by persons who** had no franchise in the national elections. (ID copies of ALL listed owner/s, as per the CSD, CK1 registration document (CIPC), BBBEE certificate)	4	
	Equity ownership **by women** **(**ID copies of ALL listed owner/s, BBBEE certificate)	2	
	Equity ownership **by disabled persons** **(**Medical certificate/ Assessment)	1	
	Equity ownership **by youth** **(**ID copies of ALL listed owner/s, BBBEE certificate)	1	
	Locality (CIPC / SARS or valid proof of address utility bill, bank statement, account statement, municipal councillor's letter)	2	
	TOTAL	**10**	

** Claimed points can only be allocated where supporting documents have been provided.
** Ownership points will be awarded on a pro-rata using share certificates / CSD / SBD
** Specific goal points are allocated to natural persons and will be awarded in accordance with company/ consortium or joint venture ownership allocation
** Locality goal points will only be awarded to suppliers within the province of delivery
** Refer to checklist attached to ensure correct document submission

5. SUBMISSIONS BY CONSORTIUMS AND JOINT VENTURES

5.1. If a submission is a consortium or joint venture, the points claimed for ownership must be detailed separately, as per annexure A and sent back with the bidding documents. The information will define the following:

The percentage (%) of the contract allocated to each JV member or consortium member. This should also be included in an agreement to be made available on request by SAMSA.

The percentage ownership of each JV member or consortium member in each of the specific goals relevant to this bid, with supporting documents.

The total points claimed will be the sum of the percentage contract allocation for each partner multiplied by the percentage weighting for each category, multiplied by the percentage ownership in the relevant specific goal.

6. **DECLARATION WITH REGARD TO COMPANY/FIRM**

6.1. Name of company/firm…….
6.2. Company registration number: ……...
6.3. Company/ firm physical address (for claiming locality points):
……
……

TYPE OF COMPANY/ FIRM [Tick applicable box]

☐ Partnership/Joint Venture / Consortium (Please refer to Annexure C)

☐ One-person business/sole propriety

☐ Close corporation

☐ Public Company

☐ Personal Liability Company

☐ Pty) Limited

☐ Non-Profit Company

☐ State Owned Company

6.4. DESCRIBE PRINCIPAL BUSINESS ACTIVITIES
……
……

6.5. TOTAL NUMBER OF YEARS THE COMPANY/ FIRM HAS BEEN IN BUSINESS? ……

6.6. List of shareholder/s information to be used to calculate the points claimed in paragraph 4.3.

NAME	**ID NUMBER**	**HDI** (**Yes / No)			**Youth** (**Yes/ No)	% of company / firm owned
		No franchise prior to elections	Women	Disabled		

6.7. 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 bid, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

i) The information furnished is true and correct;

ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;

iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 4.1 and 5.6, the contractor may be required to furnish documentary proof to the satisfaction of SAMSA 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, SAMSA may, in addition to any other remedy it may have –

(a) disqualify the person from the bidding process;

(b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;

(c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;

(d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and

(e) forward the matter for criminal prosecution, if deemed necessary.

……

SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME: ……

DATE: ……

ADDRESS: ……

……

……

……

SAMSA
SOUTH AFRICAN
MARITIME SAFETY AUTHORITY

ANNEXURE A: SPECIFICATION / DESCRIPTION OF GOODS

1. BACKGROUND

1.1 SAMSA's Whistleblowing Policy requires an independent and confidential reporting channel through which employees, stakeholders, service providers and members of the public can report suspected fraud, corruption and other misconduct, anonymously if they choose.

1.2 SAMSA invites quotations from suitably experienced service providers to provide and manage this whistleblowing hotline for a period of three (3) years, including taking over SAMSA's existing hotline numbers.

2. SCOPE OF WORK

2.1 The service provider must provide the following:

No	Requirement	Description
2.1.1	Availability	The hotline must operate 24 hours a day, 7 days a week, 365 days a year (24/7/365).
2.1.2	Reporting channels	At a minimum: toll-free telephone number, SMS, email and a secure online (web) reporting form. Any additional channels offered (e.g. WhatsApp or a mobile app) must be included in the price.
2.1.3	Existing numbers	Take over SAMSA's existing hotline telephone, SMS and fax numbers, including all transfer costs, so that the numbers stay the same and the service is not interrupted.
2.1.4	Languages	Reports must be accepted in all official South African languages, either directly or through an interpreter.
2.1.5	Anonymity and confidentiality	Whistleblowers must be able to remain anonymous. The identity of a whistleblower may not be disclosed to SAMSA or anyone else without the whistleblower's consent. The service must comply with the Protected Disclosures Act, 2000 and the Protection of Personal Information Act, 2013 (POPIA).
2.1.6	Recording of reports	Record every report in a secure case register with a unique reference number, category and risk rating, and give the whistleblower the reference number to follow up.
2.1.7	Referral to SAMSA	Refer every report to SAMSA's Risk Management Department within two (2) working days. Urgent or high-risk reports must be referred within 24 hours. Reports that implicate the officials who normally receive reports must be referred to the alternative contact agreed with SAMSA.
2.1.8	No investigations	The service provider receives, records and refers reports only. It does not investigate or make findings on allegations.
2.1.9	Information security	Use secure, access-controlled systems with backups and disaster recovery. Notify SAMSA within 24 hours of any actual or suspected security incident involving whistleblowing information.
2.1.10	Implementation	The hotline, including the transfer of the existing numbers, must be fully operational within thirty (30) days of appointment.
2.1.11	End of contract	At the end of the contract, hand over all records to SAMSA securely and delete any remaining copies, as instructed by SAMSA.

3. REPORTING TO SAMSA

3.1 The service provider will report to SAMSA's Risk Management Department as follows:

Report	When	Content
Urgent report alert	Within 24 hours of receipt	Details of the urgent or high-risk allegation.
Monthly report	By the 7th working day of the following month	Number of reports received, channels used, categories, risk ratings, referrals and their status, and service performance (availability and calls missed or abandoned).
Quarterly trend report	Every quarter	Trends, recurring issues and emerging risk areas.
Service review meeting	Quarterly, or when requested by SAMSA	Service performance, trends and any issues to be resolved.

3.2 Reports must not identify anonymous whistleblowers.

4. CONTRACT PERIOD AND CONDITIONS

4.1 The contract will be for three (3) years from the start date stated in the service level agreement (SLA).

4.2 The appointed service provider must sign an SLA and an agreement for the processing of personal information (as an operator in terms of POPIA).

4.3 The once-off set-up fee will be paid once the hotline is fully operational and accepted by SAMSA. The monthly service fee will be paid monthly in arrears, within thirty (30) days of receipt of a valid tax invoice.

5. EVALUATION CRITERIA

5.1 Phase 1 – Mandatory requirements.

Bidders must submit all mandatory requirements listed below. Failure to submit the required supporting documentation, or failure to meet any of the mandatory requirements, will result in disqualification and the bid will not proceed to the next stage of the evaluation process.

No	Mandatory requirement	Comply	Not comply
M1	**Company Experience:** Submit a minimum of two (2) reference letters from current and/or previous clients for whom the bidder has provided an independent whistleblowing hotline service. Reference letters must be on the client's official letterhead, signed by an authorised representative, include the client's contact details, clearly describe the whistleblowing hotline service provided, and be dated within the last five (5) years from the RFQ closing date. Where the reference letter is undated, it must clearly indicate the date or period during which the project was undertaken.		
M2	**SERVICE PROPOSAL**: Submit a service proposal of not more than five (5) pages confirming the bidder's ability to meet the requirements of this specification. The proposal must, at a minimum, address all the below six (6) elements: • 24 hours per day, 7 days per week, 365 days per year operation of the hotline; • Reporting channels available (telephone, SMS, email and web-based reporting platform, as a minimum); • Availability of reporting in different languages; • Measures to ensure anonymity and confidentiality a • Implementation plan demonstrating the bidder's ability to make the service fully operational within agreed timelines, including the transfer of the existing numbers; and • A sample monthly report (sample data may be anonymised).		

6. PRICING SCHEDULE – ANNEXURE B

(THE TOTAL PRICE MUST BE INCLUSIVE OF VAT)

Name of bidder…… RFQ NUMBER: ……

DESCRIPTION OF GOODS OR SERVICES:
……

6.1 Phase 2 – Price and specific goals. Responsive bids will be evaluated on price (80 points) and specific goals (20 points) using the 80/20 preference point system, in terms of the Preferential Procurement Policy Framework Act, 2000 and the Preferential Procurement Regulations, 2022. The specific goals and the proof required are set out in the attached SBD 6.1.

6.2 Bidders must complete the pricing schedule below. All prices must be in South African Rand.

No	Description	Year 1	Year 2	Year 3
1	Once-off set-up, including the transfer of SAMSA's existing numbers	R	Not applicable	Not applicable
2	Monthly service fee (24/7/365 hotline, all channels and languages, call and SMS costs, case register and reporting)	R _____ per month	R _____ per month	R _____ per month
2.1	Annual service fee (item no. 2 × 12 months)	R	R	R

6.2.1 TOTAL CONTRACT PRICE MUST

No.	Description	Amount (R)
1	Once-off set-up fee (including VAT)	R
2	Total Year 1 cost (including VAT)	R
3	Total Year 2 cost (including VAT)	R
4	Total Year 3 cost (including VAT)	R
5	**TOTAL CONTRACT VALUE FOR THREE (3) YEARS INCLUDING VAT**	**R**

5.2 Prices must include all costs to deliver the full scope, including toll-free call and SMS costs, interpreting, systems, reporting and number transfers. No additional charges per call or per report will be accepted.

5.3 The prices for Year 2 and Year 3 must include any annual increase. Prices are fixed for each year of the contract.

5.4 Bidders who are not registered for VAT must not add VAT.

5.5 Quotations must remain valid for ninety (90) days from the closing date.

REQUIRED SUPPORTING DOCUMENTS & CHECKLIST

No.	Document description	Submitted (Yes / No)
1	Quotation	
2	Signed SBD (RFQ) Forms	
3	Recent CSD, not older than 3 months	
4	Tax pin certificate	
5	Valid B-BBEE	
6	CK1 registration document (CIPC)	
7	ID copies of ALL listed owner/s as per CSD report	
8	Proof of address not older than 3 months	
9	Medical certificate/ Assessment (if applicable)	
10	Consortiums and Joint Ventures Form (if applicable)	

**ALL INFORMATION SUBMITTED WILL BE TREATED AS EVIDENCE FOR AWARDING POINTS FOR THE SAMSA GOALS AND MUST BE CONSISTENT WITH DECLARATIONS MADE. INCONSISTENT INFORMATION PROVIDED MAY RESULT IN 0 POINTS AWARDED FOR THE APPLICABLE GOAL. SAMSA RESERVES THE RIGHT TO DISQUALIFY BIDDERS WITH SUPPORTING DOCUMENTS THAT ARE NOT DULY SUBMITTED IN TERMS OF THE BID CONDITIONS.

GUIDELINES FOR DOCUMENTS REQUIRED FOR THE VERIFICATION OF THE SAMSA GOALS

SPECIFIC GOAL	**DOCUMENTS THAT WILL BE USED TO VERIFY THE INFORMATION SUPPLIED**
Equity ownership **by persons who** had no franchise in the national elections *Points for persons or categories of persons historically disadvantaged on the basis of race (black people)*	ID copies of all listed owner/s as per CSD report CK1 registration document (CIPC) BBBEE certificate
Equity ownership **by women** *Points for persons or categories of persons historically disadvantaged on the basis of gender (women)*	ID copies of all listed owner/s as per CSD report BBBEE certificate
Equity ownership **by disabled persons** *Points for persons or categories of persons historically disadvantaged on the basis of disability (persons living with disabilities).*	Medical certificate/ Assessment
Equity ownership **by youth**	ID copies of all listed owner/s as per CSD report
Locality	Address listed on the company registration CIPC / SARS document is acceptable for claiming locality points. Should you want to claim locality points, for an address not listed on the CIPC / SARS document, that address must be listed on the CSD, accompanied by a valid proof of residence, reflecting one of the listed owners' names and physical address. e.g. Utility bill, bank/ account statement, Municipal councillor's letter.

ANNEXURE C: Only if selected Partnership/Joint Venture / Consortium"
6.4 (TYPE OF COMPANY/ FIRM)

APPLICABLE FOR CONSORTIUMS AND JOINT VENTURES (JV)

CONSORTIUMS AND JOINT VENTURES OWNERSHIP FORM

(This form is only applicable for consortiums & JVs only)

a) The percentage (%) of the contract allocated to each JV member or consortium member. This should also be included in an agreement to be made available on request by SAMSA, should a need a arise.

NO	JV or consortium company name	PERCENTAGE FOR EACH MEMBER
1		
2		
3		
	TOTAL	100%

** Additional lines can be added for more

b) The percentage ownership of each JV member or consortium member in each of the specific goals relevant to this bid, with supporting documents. The total points claimed will be the sum of the percentage contract allocation for each partner multiplied by the percentage weighting for each category, multiplied by the percentage ownership in the relevant specific goal.

JV or consortium: 1

NAME	ID NUMBER	HDI** (**Yes / No)			Youth** (**Yes/ No)	% of company / firm owned
		No franchise prior to elections	Women	Disabled		

JV or consortium: 2

NAME	ID NUMBER	HDI** (**Yes / No)			Youth** (**Yes/ No)	% of company / firm owned
		No franchise prior to elections	Women	Disabled		

** Additional lines / tables may be added if necessary