SBD 1: PART A

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE SOUTH AFRICAN MARITIME SAFETY AUTHORITY					
RFQ NUMBER:	RFQ – HO - 1838	ISSUE DATE	13 November 2026	CLOSING TIME:	11h00
		CLOSING DATE	23 November 2026		
DESCRIPTION	**CUSTOMISATION AND FACILITATION OF A ONE (1) DAY NEGOTIATION SKILLS TRAINING PROGRAMME FOR TWENTY-TWO (22) SAMSA OFFICIALS, TAILORED TO THE PUBLIC SECTOR (PFMA) PROCUREMENT ENVIRONMENT. REFER TO ANNEXURE A FOR THE DETAILED SPECIFICATION.**				
BRIEFING SESSION (If applicable)	**N/A**				
DELIVERY ADDRESS	**SAMSA HEAD OFFICE, 146 LUNNON ROAD, HILLCREST, PRETORIA, 0083 (GAUTENG)**				
VALIDITY PERIOD	**Price quoted must remain valid for at least sixty (60) days after the closing date. Quotations with a shorter validity period may not be considered.**				
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.

FOREIGN SUPPLIERS THAT ANSWER "NO" TO ALL OF THE ABOVE MUST COMPLETE AND SIGN THIS QUESTIONNAIRE. SAMSA WILL SUBMIT IT TO SARS TO CONFIRM THAT THE SUPPLIER HAS NO TAX OBLIGATIONS IN SOUTH AFRICA BEFORE AWARD.

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, 2022, THE SAMSA SUPPLY CHAIN MANAGEMENT POLICY AND PROCEDURES, 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 (SBD 7.1 FOR GOODS / SBD 7.2 FOR SERVICES), FOR LONG TERM CONTRACTS OR WHERE 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. SAMSA RESERVES THE RIGHT TO DISQUALIFY BIDDERS WITH SUPPORTING DOCUMENTS THAT ARE NOT DULY SUBMITTED IN TERMS OF THE BID CONDITIONS.

1.8. DELIVERY COSTS IN THE QUOTATION WILL NOT BE CONSIDERED SEPARATELY, BUT RATHER AS PART OF THE TOTAL QUOTATION DURING THE EVALUATION.

1.9. WHERE ADDITIONAL LINE ITEMS, COSTS OR PRICING COMPONENTS NOT LISTED IN THE PRICING SCHEDULE (ANNEXURE B) ARE NECESSARY TO PRICE THE FULL SCOPE OF THE BID, BIDDERS MUST ADD THEM TO ANNEXURE B SO THAT THEY ARE INCLUDED IN THE TOTAL BID PRICE. ADDING SUCH ITEMS DOES NOT REMOVE THE REQUIREMENT TO PRICE EVERY LINE ITEM IN ANNEXURE B. WHERE A LINE ITEM IN ANNEXURE B IS NOT PRICED AND THE OMISSION AFFECTS THE EVALUATION OR MEANS THE FULL SCOPE IS NOT PRICED, THE BID MAY BE DECLARED NON-RESPONSIVE.

1.10. BIDDERS MUST NOT QUALIFY THEIR BIDS. ANY QUALIFICATION, CONDITION, EXCLUSION OR DEVIATION INCLUDED BY A BIDDER IN ITS QUOTATION, PROPOSAL OR SUPPORTING DOCUMENTS WILL NOT BE REGARDED AS ACCEPTED BY SAMSA MERELY BECAUSE THE BID WAS RECEIVED OR EVALUATED, AND WILL ONLY BIND SAMSA IF EXPRESSLY ACCEPTED BY SAMSA IN WRITING. SAMSA IS NOT OBLIGED TO IDENTIFY OR SEEK CLARIFICATION ON SUCH CONDITIONS. BIDDERS REMAIN RESPONSIBLE FOR ENSURING THAT THEIR SUBMISSIONS COMPLY WITH THE SPECIFICATION / TERMS OF REFERENCE (ANNEXURE A) AND ALL BID REQUIREMENTS. A BID THAT IS MATERIALLY QUALIFIED MAY BE DECLARED NON-RESPONSIVE.

1.11. THE PRICING SCHEDULE (ANNEXURE B) IS THE GOVERNING PRICING DOCUMENT. ANY SEPARATE QUOTATION, PROPOSAL OR COST BREAKDOWN SUBMITTED BY THE BIDDER WILL BE TREATED AS SUPPLEMENTARY INFORMATION ONLY AND, IN THE EVENT OF ANY DISCREPANCY, THE PRICE IN ANNEXURE B WILL PREVAIL.

1.12. SAMSA WILL ONLY AWARD TO BIDDERS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), EXCEPT FOREIGN SUPPLIERS THAT DO NOT HAVE A REGISTERED ENTITY IN SOUTH AFRICA.

1.13. WHERE A QUOTED PRICE APPEARS TO BE ABNORMALLY LOW OR UNREALISTIC, SAMSA MAY REQUEST A WRITTEN EXPLANATION FROM THE BIDDER. FAILURE TO PROVIDE A SATISFACTORY JUSTIFICATION MAY RESULT IN THE BID BEING DECLARED NON-RESPONSIVE.

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.

2.8 BIDS WILL NOT BE CONSIDERED FROM BIDDERS WHOSE OWNERS, DIRECTORS, MEMBERS OR SHAREHOLDERS ARE FORMER SAMSA EMPLOYEES, BOARD OR BOARD COMMITTEE MEMBERS UNTIL TWENTY-FOUR (24) MONTHS HAVE PASSED FROM THE END DATE OF THEIR SERVICE OR EMPLOYMENT WITH SAMSA. FORMER EMPLOYEES DISMISSED BY SAMSA MAY NOT DO BUSINESS WITH SAMSA FOR FIVE (5) YEARS FROM THE DATE OF DISMISSAL.

2.9 WHERE THE RECOMMENDED BIDDER IS NOT TAX COMPLIANT, SAMSA WILL NOTIFY THE BIDDER IN WRITING AND ALLOW SEVEN (7) WORKING DAYS TO REGULARISE ITS TAX AFFAIRS WITH SARS. FAILURE TO DO SO MAY RESULT IN DISQUALIFICATION AND THE AWARD BEING RECOMMENDED TO THE NEXT ELIGIBLE BIDDER.

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 consortium[1] 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

1

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	**5**
c) who has a disability	**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	**4**
b) who is a female	**2**
c) who has a disability	**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.

1.7 Specific goal points will only be awarded to bidders that submit a valid B-BBEE certificate or sworn affidavit, together with the supporting documents listed in paragraph 4 and the checklist.

2. DEFINITIONS

(a) **"locality"** means the promotion of service providers located within a specific area. For this bid, the specific area is the province of the delivery address stated in SBD 1: Part A;

(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 tendered 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;

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

(g) "youth" means any person between the ages of 14 and 35 years, eligible to do business in South Africa. A person is considered a youth up until just before their 36th birthday; and

(h) "disability" means, in respect of a person, a permanent impairment of a physical, intellectual, or sensory function, which results in restricted, or lack of, ability to perform an activity in the manner, or within the range, considered normal for a human being.

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

or

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

or

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**
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), B-BBEE certificate or sworn affidavit)	7	
	Equity ownership **by women** **(**ID copies of ALL listed owner/s, B-BBEE certificate or sworn affidavit)	5	
	Equity ownership **by disabled persons** **(**Medical certificate/ assessment by a registered medical practitioner)	2	
	Equity ownership **by youth** **(**ID copies of ALL listed owner/s, B-BBEE certificate or sworn affidavit)	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 who are South African citizens and will be awarded in accordance with company/ consortium or joint venture ownership allocation
** Shares held by juristic persons (e.g. companies or trusts) do not qualify for specific goal points.
** Locality goal points will only be awarded to suppliers located within the province of the delivery address stated in SBD 1: Part A
** 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), B-BBEE certificate or sworn affidavit)	4	
	Equity ownership **by women** **(**ID copies of ALL listed owner/s, B-BBEE certificate or sworn affidavit)	2	
	Equity ownership **by disabled persons** **(**Medical certificate/ assessment by a registered medical practitioner)	1	
	Equity ownership **by youth** **(**ID copies of ALL listed owner/s, B-BBEE certificate or sworn affidavit)	1	
	Locality	2	

	(CIPC / SARS or valid proof of address utility bill, bank statement, account statement, municipal councillor's letter)		
	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 who are South African citizens and will be awarded in accordance with company/ consortium or joint venture ownership allocation
** Shares held by juristic persons (e.g. companies or trusts) do not qualify for specific goal points.
** Locality goal points will only be awarded to suppliers located within the province of the delivery address stated in SBD 1: Part A
** 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 C 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 proprietor

☐ 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 4.1 or 4.2.

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 or 4.2 and 6.6, 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: ……

……

……

ANNEXURE A: SPECIFICATION / DESCRIPTION OF GOODS

DETAIL	INFORMATION
BIDDING & TECHNICAL ENQUIRIES MAY BE DIRECTED TO THE SCM CONTACT PERSON	SCM CONTACT PERSON Name: NOMFUNDO MJI Contact number: 012 366 2600 Email address: nmji@samsa.org.za
SHORT DESCRIPTION OF SERVICES / GOODS REQUIRED	Customisation and facilitation of a one (1) day, face-to-face Negotiation Skills training programme for twenty-two (22) SAMSA officials, tailored to the public sector (PFMA) procurement environment, including course material, pre- and post-training assessment, certificates of completion and a close-out report.
SERVICE / GOODS DELIVERY ADDRESS	SAMSA Head Office, 146 Lunnon Road, Hillcrest, Pretoria, 0083 (Gauteng)

DESCRIPTION OF SERVICES / GOODS REQUIRED:

1. BACKGROUND

1.1 The South African Maritime Safety Authority (SAMSA) is a public entity that must procure goods and services in line with section 217 of the Constitution, the Public Finance Management Act, 1999 (PFMA), the Treasury Regulations, the Preferential Procurement Policy Framework Act, 2000 and its Regulations, National Treasury instructions and the SAMSA Supply Chain Management (SCM) Policy.

1.2 In terms of PFMA SCM Instruction No. 02 of 2021/22 (as amended), accounting authorities must ensure that the prices received are market-related and, where they are not, that negotiations are entered into in line with their SCM policies or any other prescripts issued by the relevant treasury. SAMSA officials must therefore be able to analyse the market, determine an acceptable price and negotiate lawfully, ethically and effectively, and know when negotiations must be ended without agreement.

1.3 SAMSA requires a suitably qualified service provider to customise and facilitate a practical one (1) day Negotiation Skills training programme for twenty-two (22) officials involved in procurement planning, sourcing, evaluation, contract management and negotiations.

2. TRAINING OBJECTIVES AND LEARNING OUTCOMES

2.1 At the end of the training, delegates must be able to:

- explain the legal and governance framework that applies to negotiations in a PFMA environment, including who may negotiate, the mandate required and how negotiations must be approved and recorded;
- identify the indicators and circumstances that make negotiation necessary;
- apply market analysis methods to support procurement planning, cost estimates and negotiations;

- determine whether a price is acceptable (market related) using market intelligence, benchmarking, historical pricing, total cost of ownership and value-for-money considerations;
- plan and prepare for a negotiation (objectives, opening / target / walk-away positions, best alternative to a negotiated agreement (BATNA), negotiation team roles and mandate);
- apply appropriate negotiation styles, techniques and tactics ethically and recognise tactics used by suppliers;
- recognise when a price must not be accepted and when to conclude negotiations without agreement, and the options available thereafter; and
- document the negotiation process and outcome so that it withstands internal and external audit.

3. SCOPE OF WORK

3.1 Training details

Item	Requirement
Duration	One (1) day, face-to-face, with a minimum of six (6) contact hours excluding breaks (indicatively 08h30 to 16h00).
Number of delegates	Twenty-two (22) SAMSA officials (final list to be confirmed by SAMSA at least five (5) working days before the training).
Venue	SAMSA Head Office, 146 Lunnon Road, Hillcrest, Pretoria. SAMSA will provide the venue, data projector / screen and catering for delegates.
Training date	A date to be agreed with SAMSA, within twenty (20) working days after the purchase order is issued (envisaged for the first half of December 2026).
Language	English.
Delivery approach	Interactive and practical, with at least 40% of contact time spent on case studies, exercises, role-plays and simulations.

3.2 **Minimum content.** The programme must be customised to the South African public sector and PFMA environment and must, as a minimum, cover all of the following areas:

No.	Content area	Minimum topics to be covered
(a)	Negotiation principles and techniques applicable to public sector procurement	Distributive and integrative (win-win) negotiation; negotiation styles; the phases of negotiation (prepare, open, test, propose, bargain, close, agree and record); opening, target and walk-away positions; BATNA and zone of possible agreement; sources of power; supply positioning and supplier preferencing; questioning, listening and influencing behaviours; ethics, conflicts of interest and declarations.
(b)	Legal and governance framework for negotiations in the PFMA environment	Section 217 of the Constitution; PFMA and Treasury Regulation 16A; PPPFA and the Preferential Procurement Regulations, 2022; applicable National Treasury SCM instructions (including PFMA SCM Instruction No. 02 of 2021/22 as amended); the role of the SCM policy and delegations of authority (mandate, approvals and committees); principles that limit negotiations (fairness and equal treatment, no material change to the specification, scope or evaluation outcome, confidentiality); anti-collusion and anti-corruption requirements; audit and irregular expenditure risks; and an overview of the Public Procurement Act, 2024 (Act No. 28 of 2024) and its draft regulations, which are not yet in force.
(c)	Market analysis methodologies and their practical application	Market research and requests for information; supplier market structure and competition; price benchmarking; historical price analysis; cost and price analysis (cost build-up / should-cost); use of indices (e.g. CPI / PPI) and exchange rates; using market analysis for procurement planning, cost estimates and negotiation preparation.
(d)	Indicators and drivers that necessitate negotiations	Prices above the market-related price or the cost estimate / budget; price variances between bidders or against benchmarks; changes in market conditions; sole or single supplier situations; benchmarking outcomes; budget constraints; deviations, contract variations and extensions.

No.	Content area	Minimum topics to be covered
(e)	Determining an acceptable price	Use of market intelligence, benchmarking, historical pricing, total cost of ownership / whole-life costing and value-for-money considerations; acceptable price ranges; testing price reasonableness and documenting the basis for accepting a price.
(f)	When a price must not be accepted and when to end negotiations without agreement	Applying the walk-away position and BATNA; prices that remain non-market related after negotiation; abnormally low prices; options after unsuccessful negotiations in line with the prescripts (e.g. cancellation, re-advertisement, review of the requirement); recording and reporting the outcome.
(g)	Practical case studies and simulations	At least two (2) realistic South African public sector scenarios (e.g. a quotation above budget, a sole supplier price increase, a contract extension or variation price), in which delegates prepare a negotiation plan, conduct a role-play negotiation and complete a negotiation record, with feedback from the facilitator.

3.3 **Customisation.** The service provider must hold a virtual alignment meeting (maximum one hour) with SAMSA within five (5) working days after the purchase order is issued, to confirm the customisation of the content, case studies and templates to SAMSA's environment. SAMSA will make its SCM Policy and relevant non-confidential templates available for this purpose. The cost of customisation must be included in the price in Annexure B.

3.4 **Deliverables.** The service provider must deliver the following:

No.	Deliverable	Timeframe
D1	Customised programme outline, session plan and copies of the case studies, submitted to SAMSA for approval.	At least 5 working days before the training
D2	Course material: delegate workbook / slides (printed copy for each delegate and an electronic copy), pre-reading, and practical templates (negotiation plan, price reasonableness / benchmarking worksheet and negotiation record / minutes).	Electronic copy and pre-reading 3 working days before; printed copies on the day
D3	Facilitation of the one-day training by the facilitator proposed in the bid.	Agreed training date
D4	Attendance register signed by each delegate.	On the day
D5	Pre- and post-training knowledge assessment for each delegate, to measure the learning achieved.	On the day
D6	Delegate evaluation of the training (content, facilitator, relevance and venue).	On the day
D7	Certificate of completion for each delegate who attended the full day and completed the post-training assessment, meeting the requirements in paragraph 4.	Within 10 working days after the training
D8	Close-out report: attendance, assessment results per delegate, summary of evaluations, observations and recommendations for further development.	Within 10 working days after the training

4. CERTIFICATE REQUIREMENTS

4.1 Each certificate of completion must state, as a minimum: the delegate's full name; the title of the course; the date and duration of the training; the number of Continuing Professional Development (CPD) hours; the name of the issuing body and its accreditation/registration reference; an authorised signature; and a unique certificate number that SAMSA can verify with the issuing body.

4.2 The certificate must be issued or endorsed by one of the following:

- a recognised professional body for procurement and supply, or a training partner approved/endorsed by such a body, with CPD hours that delegates can log towards their professional membership (**preferred**);
- a public higher education institution (or its registered company for short learning programmes); or

- a skills development provider accredited by the QCTO or a SETA, for a programme aligned to a registered skills programme or unit standard in negotiation.

4.3 A one-day programme is not expected to award NQF credits. A bidder may claim NQF credits or "accredited" status only if it submits proof of accreditation for that specific programme or unit standard and conducts the required assessment. Certificates must not misrepresent the accreditation status of the training.

4.4 Bidders must submit a sample of the certificate with the bid.

5. MANDATORY TECHNICAL REQUIREMENTS (PASS / FAIL)

Bidders must meet all of the following requirements and submit the evidence listed. A bid that fails any requirement will be declared non-responsive and will not be evaluated further.

No.	Requirement	Evidence to be submitted
T1	The bidder is one of the certificate-issuing categories in paragraph 4.2.	Proof of status, e.g. letter from the professional body confirming the bidder is the body or its approved / endorsed training partner; valid QCTO / SETA accreditation letter; or proof of higher education institution status.
T2	The bidder has delivered procurement or negotiation training to South African public sector institutions in the last five (5) years.	At least two (2) signed reference letters on the client's letterhead stating the course name, date, number of delegates and contact details.
T3	The proposed facilitator must hold a qualification at NQF level 7 or higher in supply chain management, procurement, logistics, commerce, law, public administration or business management. The qualification must be either: (a) a South African qualification registered on the National Qualifications Framework (NQF) and awarded by an institution accredited or registered to award it; or (b) a foreign qualification that SAQA has evaluated and confirmed as comparable to NQF level 7 or higher.	(a) For a South African qualification: a copy of the qualification certificate. (b) For a foreign qualification: a copy of the qualification certificate **and** a copy of the SAQA Certificate of Evaluation confirming that it is comparable to NQF level 7 or higher. *SAMSA reserves the right to request certified copies of the qualification certificate (and, where applicable, the SAQA Certificate of Evaluation), certified within the last six (6) months, during evaluation. These must be submitted within the period stated in SAMSA's written request. If a bidder does not submit the certified copies on time, or they do not match the copies in the bid, the bid will not meet this requirement.*
T4	The proposed facilitator has at least five (5) years' experience in public sector SCM / procurement (practice or training), including negotiations, and at least three (3) years' experience facilitating training.	Detailed CV of the facilitator showing relevant experience, with dates, roles and training delivered.
T5	The proposed facilitator is a member of a recognised professional body for procurement and supply OR is a registered facilitator/assessor with a SETA or the QCTO.	Proof of current membership or registration.
T6	The bidder's programme covers all content areas (a) to (g) in paragraph 3.2.	Draft programme outline / agenda showing how each content area will be covered, and the practical activities.
T7	The certificate meets the requirements in paragraph 4.	Sample certificate.

6. EVALUATION

6.1 Bids will be evaluated in the following stages:

- **Stage 1 – Administrative compliance:** completed and signed SBD 1, SBD 4 and SBD 6.1, completed Annexure B, and registration on the Central Supplier Database (CSD) with a compliant tax status.
- **Stage 2 – Mandatory technical requirements:** the requirements in paragraph 5 (pass / fail).
- **Stage 3 – Price and specific goals:** responsive bids will be evaluated on the 80/20 preference point system (80 points for price and 20 points for specific goals), as set out in SBD 6.1.

6.2 SAMSA may verify any information submitted, including contacting referees and the certificate-issuing body.

7. SPECIAL CONDITIONS

7.1 The price must be fixed and all-inclusive (customisation, facilitator fees, travel, accommodation, printing of course material, assessments, certificates and the close-out report). No additional costs will be paid.

7.2 Per-delegate items in Annexure B will be paid on the actual number of delegates confirmed by SAMSA in writing five (5) working days before the training. Lump-sum items are fixed.

7.3 Payment will be made within thirty (30) days of receipt of a valid tax invoice, after all deliverables (including certificates and the close-out report) have been received and accepted by SAMSA. No payment will be made in advance.

7.4 The facilitator proposed in the bid must deliver the training. A substitute may be used only with SAMSA's prior written approval and must have equal or better qualifications and experience.

7.5 Either party may postpone the training by giving at least five (5) working days' written notice, without penalty. A new date will be agreed in writing.

7.6 The service provider keeps the copyright in its standard course material but grants SAMSA the right to use the course material and templates internally, for non-commercial training and reference purposes.

7.7 The service provider must treat delegates' personal information in line with the Protection of Personal Information Act, 2013 and use it only for this training.

ANNEXURE B: PRICING TABLE

(THE TOTAL PRICE MUST BE INCLUSIVE OF VAT)

THIS PRICING SCHEDULE IS THE GOVERNING PRICING DOCUMENT. IN THE EVENT OF ANY DISCREPANCY WITH A SEPARATE QUOTATION OR COST BREAKDOWN, THE PRICE IN THIS SCHEDULE WILL PREVAIL.

Name of bidder…… RFQ NUMBER: ……..

DESCRIPTION OF GOODS OR SERVICES:
……

Item	Description	Unit	Qty	Unit price (excl. VAT)	Total price (excl. VAT)
1	Customisation of the programme content, case studies and templates to the SAMSA / PFMA environment, including the alignment meeting (paragraph 3.3)	Lump sum	1	R	R
2	Facilitation of the one (1) day face-to-face training at SAMSA Head Office, Pretoria, including facilitator fees, travel and accommodation	Lump sum	1	R	R
3	Course material per delegate (printed workbook, electronic copy, pre-reading and templates)	Per delegate	22	R	R
4	Pre- and post-training assessment and certificate of completion (with CPD hours) per delegate	Per delegate	22	R	R
5	Close-out report (deliverable D8)	Lump sum	1	R	R
6	Other costs required to deliver the full scope (bidder to specify)			R	R
	SUB-TOTAL (excl. VAT)				R
	VAT (15%) (if VAT registered)				R
	TOTAL BID PRICE (incl. VAT) – carry over to SBD 1 Part B				R

Notes:

1. All line items must be priced. The total bid price will be used for evaluation.
2. Items 3 and 4 will also be used as the rate per delegate if the confirmed number of delegates changes (paragraph 7.2 of Annexure A).
3. Bidders that are not registered for VAT must not add VAT.
4. Prices must remain valid for sixty (60) days after the closing date.

Signature of bidder: …… Date: ……

CHECKLIST OF CLAIMING SPECIFIC GOAL POINTS

NB: THE FOLLOWING DOCUMENTS WILL BE USED TO CLAIM YOUR SPECIFIC GOALS

REQUIRED SUPPORTING DOCUMENTS & CHECKLIST

No.	Document description	Submitted (Yes / No)
1	Completed pricing schedule (Annexure B) and quotation	
2	Signed SBD (RFQ) forms: SBD 1, SBD 4 and SBD 6.1	
3	CSD supplier number (MAAA) or CSD report	
4	Tax pin certificate	
5	Valid B-BBEE certificate or sworn affidavit	
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 by a registered medical practitioner (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) B-BBEE certificate or sworn affidavit
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 B-BBEE certificate or sworn affidavit
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 by a registered medical practitioner
Equity ownership **by youth**	ID copies of all listed owner/s as per CSD report B-BBEE certificate or sworn affidavit
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
6.3 (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 the need 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