

**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-1744	ISSUE DATE	26/06/2026	CLOSING TIME:	11h00
		CLOSING DATE	03/07/2026		
DESCRIPTION	EXTERNAL JOB EVALUATION AND GRADING OF EXECUTIVE MANAGEMENT POSITIONS				
BRIEFING SESSION (If applicable)	N/A				
DELIVERY ADDRESS	SAMSA, 146 LUNNON ROAD, HILLCREST, PRETORIA				
VALIDITY PERIOD	Price quoted should remain valid for at least thirty (60) days after the closing date.				
ALL BID RESPONSE DOCUMENTS MUST BE EMAILED TO:					
rfgresponses@samsa.org.za					
(EMAIL SUBJECT LINE MUST CLEARLY INDICATE THE RFQ NUMBER)					
BIDDING PROCEDURE AND TECHNICAL ENQUIRIES MAY BE DIRECTED TO:					
CONTACT PERSON	ONKGOPOTSE SEEMELA				
TELEPHONE NUMBER	012 366 2600				
E-MAIL ADDRESS	oseemela@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?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES 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?

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. 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.

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	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.

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

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

Where

- P_s = Points scored for price of bid under consideration
 P_t = Price of bid under consideration
 P_{min} = 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

$$P_s = 80 \left(1 + \frac{P_t - P}{P} \right) \quad \text{or} \quad P_s = 90 \left(1 + \frac{P_t - P}{P_{max}} \right)$$

Where

- P_s = Points scored for price of bid under consideration
 P_t = Price of bid under consideration
 P_{max} = 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), BBBEE certificate)	7	
	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:

.....

.....

.....

.....



ANNEXURE A: SPECIFICATION / DESCRIPTION OF GOODS

1. PURPOSE

The organisation intends to appoint a suitably qualified and independent service provider to conduct an external review and evaluation of ten (10) Executive Management positions using the **Paterson Job Evaluation System as the sole prescribed methodology**.

The assignment will include a review of job profiles to assess strategic alignment, followed by formal evaluation and grading of each role.

2. OBJECTIVES

The objectives of this assignment are to:

- Review executive job profiles to assess alignment with organisational strategy
- Evaluate all roles using the Paterson Job Evaluation methodology (mandatory requirement)
- Ensure consistency and internal equity in grading across executive roles
- Benchmark executive roles against industry standards using comparable organisations of similar size and complexity
- Provide recommendations on job grading, role design, and organisational alignment

3. SCOPE OF WORK

3.1 Roles Covered

- Ten (10) Executive Management positions.

3.2 Methodology Requirements

The service provider must:

- Apply the Paterson Job Evaluation System in a consistent and defensible manner
- Conduct an independent review of the job profiles to assess the role purpose, outputs, decision-making levels, and complexity
- Facilitate information clarification sessions with relevant stakeholders (where required)

4. KEY DELIVERABLES AND OUTPUTS

The service provider will be required to deliver the following:

4.1 Project Inception

- Detailed project plan outlining methodology, timelines and stakeholder engagement approach

4.2 Data Collection and Job Analysis

- Review of job profiles
- Validation of job content, scope, decision-making authority, and accountability
- Stakeholder engagements and/or interviews (where required)

4.3 Job Evaluation and Grading

- Evaluation of each role using the Paterson methodology
- Allocation of appropriate job grades and bands

4.4 Evaluation Reports

Individual Role Reports

Each report must include:

- Evaluation factors and scoring outcomes
- Paterson band and sub-grade
- Identification of any role design or grading risks
- Clear rationale for the grading decision

Consolidated Summary Report

- Summary table reflecting grading distribution
- Observations on internal alignment and consistency
- Benchmarking insights
- Overview of the methodology applied
- Key findings and recommendations

4.5 Reporting and Presentation of Results

- One (1) formal presentation on the results
- Must be executive-level quality suitable for EXCO/Board
- The presentation must include:
 - a) Overview of methodology applied
 - b) Summary of evaluation outcomes
 - c) Explanation of grading decisions

- d) Key risks, insights, and recommendations
- e) Interactive Q&A session

5. ROLES AND RESPONSIBILITIES

5.1 Service Provider

- Ensure professional independence and objectivity
- Declare any potential conflicts of interest prior to project commencement
- Maintain strict confidentiality of all organisational information
- Apply the approved methodology consistently and accurately
- Conduct necessary clarification sessions with stakeholders
- Deliver all outputs within agreed timelines
- Maintain clear and auditable documentation supporting all evaluation decisions

5.2 Organisation / Human Capital

- Provide accurate and complete job-related information
- Facilitate access to relevant documentation and stakeholders
- Coordinate availability for interviews, clarification sessions, and presentations

6. DURATION OF ASSIGNMENT

- The assignment is expected to be completed within **2–3 weeks** from contract commencement.
- The organisation reserves the right to adjust timelines based on operational requirements.

MANDATORY REQUIREMENT

All RFQ responses that do not meet the Mandatory Requirements will be disqualified and will not be considered for further evaluation.

Mandatory Technical Requirements are as follows:

Mandatory requirement	Comply	Not Comply
Professional Certification Requirement: The Project Leader must be formally trained and certified in the application of the Paterson Job Evaluation System .		

Mandatory requirement	Comply	Not Comply
<p>The individual must hold valid certification issued by a recognised training provider or accredited institution confirming competency in the Paterson Job Evaluation methodology and must be actively involved in the execution of the assignment.</p> <p>Required Evidence: Proof of valid Paterson Job Evaluation System certification must be submitted with the bid. The certificate must clearly indicate competency in the application of the Paterson system.</p>		

7. EVALUATION CRITERIA

TECHNICAL EVALUATION CRITERIA

Service providers will be assessed on their ability to complete the job as per the below criteria.

The functionality evaluation shall be based on a threshold, where bidders who fail to achieve the minimum threshold points will not be considered for further evaluation. Points allocated for Functionality shall be evaluated in accordance with the criteria as listed below.

A minimum score of 75 / 100 points must be achieved to be eligible for further evaluation on price / SAMSA goals (80 / 20) preference points.

The Technical Requirements are as follows:

DETAIL	CRITERIA	MAX POINTS
<p>COMPANY EXPERIENCE (Total 30 points):</p> <p>The service provider must demonstrate relevant experience by submitting reference letters from clients for projects involving the job evaluation and grading of roles undertaken within the past five (5) years.</p> <p>Reference letters must:</p> <ul style="list-style-type: none"> - Be on the client's official letterhead - Be duly signed and dated - Clearly describe the nature and scope of the services provided <p>Additional Note: Contactable references may be requested for verification purposes.</p>	<p>Scoring will be allocated as follows:</p> <ul style="list-style-type: none"> • Three (3) compliant reference letters – 30 points • Two (2) compliant reference letters – 20 points • One (1) compliant reference letter – 10 points <p>Note: Failure to submit reference letters that meet the above requirements will result in 0 points being awarded for this criterion.</p>	<p>30 points</p>

<p>Methodology (Total 20 Points)</p> <p>Bidders must provide a comprehensive methodology that demonstrates a clear understanding of the Scope of Work, with specific reference to:</p> <ul style="list-style-type: none"> • Project inception • Data collection and job analysis • Job evaluation and grading • Evaluation reports • Reporting and presentation of results 	<p>Scoring will be allocated as follows:</p> <ul style="list-style-type: none"> • Excellent: Fully detailed, tailored methodology covering all scope elements, clear timelines, stakeholder engagement approach, and demonstrates a strong understanding of job evaluation and the Paterson system – 20 points • Good: Covers most scope elements with clear structure and reasonable alignment – 15 points • Fair: Partially addresses scope with limited detail – 10 points • Poor: Generic methodology with weak alignment – 5 points • No submission or fails to address scope – 0 points 	<p>20 points</p>
<p>Experience, Skills, and Ability of Team Leader (Total 30 Points)</p> <p>The Team Leader must demonstrate relevant experience in job evaluation, specifically including the application of the Paterson Job Evaluation System.</p> <p>Relevant experience must be clearly reflected in the submitted CV, indicating the duration (in years) and nature of work performed in job evaluation.</p> <p>Note:</p> <ul style="list-style-type: none"> • Experience will be calculated cumulatively based on clearly indicated periods in the CV. Overlapping periods will not be double counted. • Experience must relate directly to job evaluation. General HR experience will not be considered unless explicitly linked to job evaluation work. 	<p>Scoring will be allocated as follows:</p> <ul style="list-style-type: none"> • 10+ years relevant experience – 30 points • 5 to <10 years relevant experience – 20 points • 3 to <5 years relevant experience – 10 points • ≤3 years relevant experience – 0 points 	<p>30 points</p>

<p>Qualification of Team Leader (Total 20 Points)</p> <p>The Team Leader must possess a relevant qualification at NQF Level 8 or higher in Human Resource Management, Industrial/Organisational Psychology, Remuneration/Reward Management, Compensation and Benefits or Organisational Development, or a closely related field.</p> <p>Note:</p> <p>A certificate issued by a recognised formal tertiary institution must be submitted as proof of the qualification.</p>	<ul style="list-style-type: none"> • Team Leader holds a qualification that meets the specified minimum requirements – 20 points • Team Leader does not hold a qualification that meets the specified minimum requirements, or no proof of qualification is submitted – 0 points 	<p>20 points</p>
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Note:

- SAMSA reserves the right to verify all submitted credentials.
- In the event of a scoring tie on functionality, the bidder with the higher score in Company Experience will be ranked higher.
- Any change to the proposed Team Leader post-award must be submitted in writing for approval.

8. CONFIDENTIALITY AND DATA PROTECTION

- The service provider must comply with POPIA.
- All data must be treated as confidential.
- No information may be shared without written consent.

ANNEXURE B: PRICING TABLE

(THE TOTAL PRICE MUST BE INCLUSIVE OF VAT)

Name of bidder..... RFQ NUMBER:
DESCRIPTION OF GOODS OR SERVICES:

Please submit a detailed quotation on your company letterhead.

ITEM QUANTITY DESCRIPTION BID PRICE IN RSA CURRENCY NO. ** (ALL APPLICABLE TAXES INCLUDED)

9. PRICING STRUCTURE AND COSTING SCHEDULE

Bidders must submit pricing in accordance with the table below.
All pricing must be all-inclusive, unless otherwise stated.

Pricing Table

Cost Component	Description	Quantity	Unit Cost (ZAR)	Total Cost (ZAR)
Job Profile Review and Analysis	Job analysis and stakeholder interviews (if required) per role	10 roles		
Job Evaluation & Grading	Evaluation and grading per role	10 roles		
Individual Job Evaluation Reports	Detailed report per role	10 reports		
Consolidated Summary Report	Comprehensive report of all roles	1 report		
Presentation of Results	Presentation to HC, the CEO, and Board	1 presentation		
Travel and Disbursements	All travel and related costs	1		
Total Estimated Cost (Excl. VAT)				
VAT (if applicable)				
Total Cost (Incl. VAT)				

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 <i>Points for persons or categories of persons historically disadvantaged on the basis of race (black people)</i>	ID copies of all listed owner/s as per CSD report CK1 registration document (CIPC) BBBEE certificate
Equity ownership by women <i>Points for persons or categories of persons historically disadvantaged on the basis of gender (women)</i>	ID copies of all listed owner/s as per CSD report BBBEE certificate
Equity ownership by disabled persons <i>Points for persons or categories of persons historically disadvantaged on the basis of disability (persons living with disabilities).</i>	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 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