

**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE EC DEPT OF HEALTH					
BID NUMBER:	SCMU3-P26/27-0285-PED	CLOSING DATE:	18 JUNE 2026	CLOSING TIME:	13H00
DESCRIPTION	APPOINTMENT OF SERVICE PROVIDERS TO PROVIDE TRAINING FOR NEW FORKLIFT LICENSE, NEW REACH TRUCK LICENCE AND RENEWAL FORKLIFT LICENCES FOR PORT ELIZABETH PHARMACEUTICAL DEPOT OFFICIALS				
BID RESPONSE DOCUMENTS MUST BE FORWARDED TO:					
1104 STRUANWAY ROAD STRUNDALE, PE MEDICAL DEPOT , PORT ELIZABETH 6000					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	Ms. Thulani Lumkwana		CONTACT PERSON	Ms. M.Bodenstein	
TELEPHONE NUMBER	041 452 1563		TELEPHONE NUMBER	084 511 0388	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
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.					

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE UPLOADED BY THE STIPULATED TIME TO THE ETENDERS WEBSITE. 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 WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).**

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS 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.

SIGNATURE OF BIDDER:

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

DATE:

SIGNATURE OF BIDDER:

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

DATE:.....

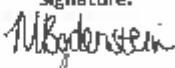
APPOINTMENT OF SERVICE PROVIDERS TO PROVIDE TRAINING FOR NEW FORKLIFT LICENSE, NEW REACH TRUCK LICENCE AND RENEWAL FORKLIFT LICENCES FOR PORT ELIZABETH PHARMACEUTICAL DEPOT OFFICIALS			
Drafted By: SDC CHAIRPERSON	Date: 10/06/2026	Name: M. Bodenstein	Signature: 
Reviewed By: Supply Chain Officer	Date: 10/06/2026	Name: T. Lumkwana	Signature: 
Approved By: BSC Chairperson	Date: 10/06/2026	Name: D. Martin	Signature: 

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PART 1
CONDITIONS OF BID

1 BACKGROUND AND INTRODUCTORY PROVISION

1.1 BACKGROUND

The Eastern Cape Department of Health is considering engaging with suitable qualified service providers who have capability for the provision of training for new forklift licenses, new reach truck licenses and forklift renewal licenses for officials at Port Elizabeth Pharmaceutical Depot.

Without detracting from the generality of clause below, bidders must submit a completed and signed Invitation to Bid form (SBD 1) and requisite bid forms (attached as Part 5) with its bid. Bidders must take careful note of the special conditions.

1.2 All bids submitted in reply to this invitation to bid should incorporate all the forms, parts, certificates and other documentation forming part of this invitation to bid, duly completed where required.

1.3 In the event that any form or certificate provided in Part 5 of this invitation to bid does not have adequate space for the bidder to provide the requested details, the bidder should attach an annexure to such form or certificate on which the requested details should be provided and the bidder should refer to such annexure in the form or certificate provided.

1.4 Respondents are required to submit costing on Rates based per item.

1.5 Should a respondent supply any equipment or peripheral equipment not listed in this specification it must be stipulated and costed as per table "Additional Unspecified Equipment"

1.6 Should a service provider not meet any of the listed Mandatory Requirements the submission will be disqualified?

2 OFFER AND SPECIAL CONDITIONS

2.1 Without detracting from the generality of clause below, bidders must submit a completed and signed Invitation to Bid form (SBD 1) and requisite bid forms attached as Part 1 with its bid. Bidders must take careful note of the special conditions

2.2 All bids submitted in reply to this invitation to bid should incorporate all the forms, parts, certificates and other documentation forming part of this invitation to bid, duly completed where required.

2.3 In the event that any form or certificate provided in Part 5 of this invitation to bid does not have adequate space for the bidder to provide the requested details, the bidder should attach an annexure to such form or certificate on which the requested details should be provided and the bidder should refer to such annexure in the form or certificate provided.

3 CLOSING TIME OF BIDS AND PROVISIONS RELATING TO SUBMISSION OF BIDS

3.1 The closing time for the receipt of bids in response to this invitation to bid is detailed on the cover page of this invitation to bid.

4 ENQUIRIES

4.1 Should any bidder have any enquiries relating to this invitation to bid, such inquiries may only be addressed to the person/s detailed on the cover page to this invitation to bid at the number/s stipulated.

5 COMPULSORY BRIEFING

- 5.1 There will be no bid clarification meeting for this bid.

6 PRICING

- 6.1 The bidder must submit details regarding the bid price for the Services on the Pricing Schedule form/s attached as Part 5 – Schedule C which completed form/s must be submitted together with the bid documents.
- 6.2 Pricing must be stipulated INCLUSIVE OF VALUE ADDED TAX.
- 6.3 It is an express requirement of this invitation to bid that the bidders provide some transparency in respect to their pricing approach. In this regard, bidders must indicate the basis on which they have calculated their pricing by completing all aspects of the Pricing Schedule form Part 5 – Schedule A.

7 DECLARATION OF INTEREST

- 7.1 The bidder should submit a duly signed declaration of interest (SBD 4) together with the bid. The declaration of interest is attached as Part 5 – Schedule B.

8 PREFERENCE POINTS CLAIM FORM

- 8.1 Part 5 – Schedule C contains the Preference Points Claim Forms in terms of Preferential Procurement Regulations to be completed and signed by the bidder to the extent applicable and returned with this bid.

9 VALIDITY

- 9.1 Bid documentation submitted by the bidder will be valid and open for acceptance for a period of **60 (Sixty)** calendar days from the closing date and time stipulated on the front cover of this invitation to bid.

10 ACCEPTANCE OF BIDS

- 10.1 The State, the DoH does not bind itself to accept either the lowest or any other bid and reserves the right to accept the bid which it deems to be in the best interest of the State even if it implies a waiver by the State, the DoH, of certain requirements which the State, the DoH, considers to be of minor importance and not complied with by the bidder.

11 NO RIGHTS OR CLAIMS

- 11.1 Receipt of the invitation to bid does not confer any right on any party in respect of the Services or in respect of or against the DoH. The DoH reserves the right, in its sole discretion, to withdraw by notice to bidders any Services or combination of Services from the bid process, to terminate any party's participation in the bid process or to accept or reject any response to this invitation to bid on notice to the bidders without liability to any party. Accordingly, parties have no rights, expressed or implied, with respect to any of the Services as a result of their participation in the bid process.
- 11.2 Neither the DoH, nor any of their respective directors, officers, employees, agents, representatives or advisors will assume any obligations for any costs or expenses incurred by any party in or associated with any appraisal and/or investigation relating to this invitation to bid or the subsequent submission of a bid in response to this invitation to bid in respect of the Services or any other costs, expenses or liabilities of whatsoever nature and howsoever incurred by bidders in connection with or arising out of the bid process.

12 NON DISCLOSURE, CONFIDENTIALITY AND SECURITY

- 12.1 The invitation to bid and its contents are made available on condition that they are used in connection with the bid process set out in the invitation to bid and for no other purpose. All information pertaining to this invitation to bid and its contents shall be regarded as restricted and divulged on a “need to know” basis with the approval of the DoH.
- 12.2 In the event that the bidder is appointed pursuant to this invitation to bid such bidder may be subject to security clearance prior to commencement of the Services.

13 ACCURACY OF INFORMATION

- 13.1 The information contained in the invitation to bid has been prepared in good faith. Neither the ECDOH nor any of their respective directors, advisors, officers, employees, agents, representatives make any representation or warranty or give any undertaking express or implied, or accept any responsibility or liability whatsoever, as to the contents, accuracy or completeness of the information contained in the invitation to bid, or any other written or oral information made available in connection with the bid and nothing contained herein is, or shall be relied upon as a promise or representation, whether as to the past or the future.
- 13.2 This invitation to bid may not contain all the information that may be required to evaluate a possible submission of a response to this invitation to bid. The bidder should conduct its own independent analysis of the operations to the extent required to enable it to respond to this bid.

14 COMPETITION

- 14.1 Bidders and their respective officers, employees and agents are prohibited from engaging in any collusive action with respect to the bidding process which serves to limit competition amongst bidders.
- 14.2 In general, the attention of bidders is drawn to Section 4(1)(iii) of the Competition Act 1998 (Act No. 89 of 1998) (the Competition Act) that prohibits collusive bidding.
- 14.3 If bidders have reason to believe that competition issues may arise from any submission of a response to this bid invitation they may make, they are encouraged to discuss their position with the competition authorities before submitting response.
- 14.4 Any correspondence or process of any kind between bidders and the competition authorities must be documented in responses to this invitation to bid.

15 RESERVATION OF RIGHTS

- 15.1 Without limitation to any other rights of the or the ECDOH (whether reserved in this invitation to bid or under law), the ECDOH expressly reserves the right to:-
 - 15.1.1 Request clarification on any aspect of a response to this invitation to bid received from the bidder, such requests and the responses to be in writing;
 - 15.1.2 Amend the bidding process, including the timetables, closing date and any other date at its sole discretion;

15.1.3 Reject all responses submitted by bidders and embark on a new bid process.

15.1.4 Award the bid to one or more than one bidder/s

16. EVALUATION CRITERIA

The bid will be evaluated in terms of regulation 4(1) of the preferential procurement regulation 80/20 preference point system will be applied where the lowest bidder will be allocated 80 points for price. a maximum of 20 points will be awarded for specific goals

the following formula will be used to calculate points out of 80 for price

$$Ps = 80 \left(1 + \frac{80/20 \cdot Pt - P_{max}}{P_{max}} \right) \text{ or}$$

Where

- Ps = Points scored for price of tender under consideration
Pt = Price of tender under consideration
Pmax = Price of highest acceptable tender

The following table must be used to calculate the score out of 20 points for Specific Goals

The specific goals allocated points in terms of this tender	Weighting (of 20 POINTS)	Number of points (80/20 system)
Historically Disadvantaged Individuals Ownership	20%	4
Women Ownership	20%	4
Youth Ownership	20%	4
Disability Ownership	20%	4
Military Veterans Ownership	10%	2
Locality Ownership	10%	2
TOTAL	100%	20

a) A tenderer must submit proof of its Specific Goals status of contributor.

b) A tenderer failing to submit proof of Specific Goals status level of contributor or is a non-compliant contributor to Specific Goals may not be disqualified, but may only score points out of 80 price, and scores 0 points out of 20 for Specific Goals.

c) The Specific Goals supporting documents required to verify claimed points may inline with the specified requirements include:

- CSD report (must be recent within 7 days from closing date);

- CIPRO certificate and/or ID copies (must be certified with original stamp within 3 months from closing date of bid/quote);
 - Medical certificate / Doctor's medical report (Impairment should be substantially limiting - long term or of recurring nature)
 - Municipal accounts or proof of address
- d) A tenderer may not be awarded points for Specific Goals status level of contributor if the tender documents indicate that they intend subcontracting 25% of their contract value to any other person not qualifying for at least the points that the tenderer qualifies for, unless the intended subcontractor is an EME that has the capability to execute the contract.

Bidders required to meet the following criteria indicated in stages.

16.1 The bid will be evaluated as follows:

- 16.1.1 Stage 1: Administrative compliance
- 16.1.2 Stage 2: Mandatory Requirements
- 16.1.3 Stage 3: Functionality
- 16.1.4 Stage 4: Price & Specific Goals' points

16.1.1 STAGE 1: ADMINISTRATIVE COMPLIANCE

#	<i>Requirement</i>	Please Tick ☐		
		(Complied/Non-compliant)		
		Yes	No	N/A
A	Invitation to Bid (SBD1)			
B	Pricing Schedule (SBD 3.2) completed and signed.			
C	Declaration of Interest (SBD 4) completed and signed.			
D	Preferential Points Claim (SBD 6.1) completed and signed.			
E	Original hard copy of the bid document to be submitted			
F	The Bidder's Tax status compliant on CSD and valid for 30 days on submission of the bid (Attach Detailed CSD report)			
G	JV or Consortium Agreement where applicable			

16.1.2 STAGE 2: COMPLIANCE WITH NON-NEGOTIABLE (COMPULSORY) REQUIREMENTS

Item No.	REQUIREMENTS	Compliance Yes / No/Not applicable	Comment
1.	A provider must be accredited by the relevant Training Council (Provide a copy of the accreditation certificate SETA/SAQA).		

16.1.3. STAGE 3 FUNCTIONALITY EVALUATION

STAGE 3 – Functional Requirements of Bidder (Functional Evaluation = 30 Points)

- All bidders are required to respond to the functional evaluation criteria scorecard and compliance checklist for detailed information.
 - Only Bidders that have met the Mandatory (Stage 2) Criteria will be evaluated for Functionality. Functionality will be evaluated as follows:
 - (a) A bidder that scores less than 21 points out of 30 in respect of functionality will be regarded as non-responsive bid and will be disqualified.
 - (b) Only bidders that obtain a minimum of 70% (percent) equivalent to 21 points for functionality will qualify for further evaluation in terms of price.
 - (c) All points scored by qualifying bidders will not be taken into consideration for price evaluation.
- The following evaluation Functionality Scoring Matrix is applicable. Prospective bidders are required to obtain a minimum threshold of 21 points to proceed to next stage of price evaluation. Any bidder(s) who do not meet the required threshold will be disqualified and not considered any further.

Functionality Evaluation Scoring

Criteria	Scoring Matrix	Max Score	Evidence
References	Clients references up to 3 with positive references letters & contact details, for supply and delivery of training services. Three references = 5 Two references = 3 One reference = 2 Zero references = 0	5	Listing of client name, contract value, contact details & references letter.
Experience	Relevant experience as a training provider. Above 5 years = 5 3 to 4years = 3 0 to 2 years = 1	5	Profile of the company, proof of company age and operations, CV's of key staff if it is a new company. Client reference letters reflecting the contract number, value and duration of contract.
Quality Assurance	Training Council Accreditation Certificate = 10 No Training Council Accreditation Certificate = 0	10	Submission of Accreditation Certificate SETA/SAQA from a Training Council.
Product information	Course outline provided = 5 No course outline provided = 0	5	Mandatory requirements: - - Catalogue to be provided that include the modules/learning outcomes of the course.
Execution plan	Detailed execution plan (schedule o) = 5 No Execution plan = 0	5	The bidder must provide an execution plan on how the contract is going to be effected successfully including lead times.
	Total Points	30	

16.1.4 PRICE AND SPECIFIC GOALS POINTS

16.1.4.1 POINTS AWARDED FOR PRICE

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

$$\begin{array}{ccc} \mathbf{80/20} & \text{or} & \mathbf{90/10} \\ \\ \mathbf{Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \text{or} & \mathbf{Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

Where

Ps	=	Points scored for price of tender under consideration
Pt	=	Price of tender under consideration
Pmax	=	Price of highest acceptable tender

16.1.4.2 POINTS AWARDED FOR SPECIFIC GOALS

- a) In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/documentation stated in the conditions of this tender:
- b) In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the **80/20** or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
 - (a) an invitation for tender for income-generating contracts, that either the **80/20** or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the **80/20** or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,then the organ of state must indicate the points allocated for specific goals for both the 90/10 and **80/20** preference point system.
- c) Bidders are required to complete the preference claim form (SBD 6.1), and submit the copies or certified copies of the following documents at the closing date and time of the bid in order to claim the Specific Goal level points.
 - a. Copies of valid Business Registration Documents
 - b. Copies of ID Documents of all Company Owners/Directors/Shareholders
 - c. Copies of Medical Certificate in Respect of Disability Claim
 - d. Copies of Rental Agreement and or Municipality Utility account in your business name as proof of the business address etc.
- d) A bid will not be disqualified from the bidding process if the bidder does not submit any of the required documents mentioned in item 23.3.a-d to claim specific goals. Such bidders will score 0 out of maximum of 10 points for specific goals.

- e) The points scored by a bidder in respect of the level of Specific Goals Claimed will be added to the points scored for price.
- f) The department may, before a bid is adjudicated or at any time, require a bidder to substantiate claims it has made with regards to preference.
- g) The total points scored will be rounded off to the nearest 2 decimals.
- h) In the event that two or more bids have scored equal total points, the contract will be awarded to the bidder scoring the highest number of preference points for Specific Goals.
- i) However, when functionality is part of evaluation process and two or more bidders have scored equal points including equal preference points for Specific goals, the contract will be awarded to the bidder scoring the highest functionality.
- j) Should two or more bids equal in all respects, the award shall be decided by drawing of lots.
- k) A contract may, on reasonable and justifiable grounds, be awarded to a bid that did not score the highest number of points

The following table must be used to calculate the score out of 20 points for Specific Goals

The specific goals allocated points in terms of this tender	Weighting (of 20 POINTS)	Number of points (80/20 system)
Historically Disadvantaged Individuals Ownership	20%	4
Women Ownership	20%	4
Youth Ownership	20%	4
Disability Ownership	10%	4
Military Veterans Ownership	10%	2
Locality Ownership	20%	2
TOTAL	100%	20

- a) A tenderer must submit proof of its Specific Goals status of contributor.
- b) A tenderer failing to submit proof of Specific Goals status level of contributor or is a non-compliant contributor to Specific Goals may not be disqualified, but may only score points out of 80 price, and scores 0 points out of 20 for Specific Goals.
- c) The Specific Goals supporting documents required to verify claimed points may in line with the specified requirements include:
 - CSD report (must be recent within 7 days from closing date);
 - CIPRO certificate and/or ID copies (must be certified with original stamp within 3 months from closing date of bid/quote);

- Medical certificate / Doctor's medical report (Impairment should be substantially limiting - long term or of recurring nature)
- Municipal accounts or proof of address

d) A tenderer may not be awarded points for Specific Goals status level of contributor if the tender documents indicate that they intend subcontracting 25% of their contract value to any other person not qualifying for at least the points that the tenderer qualifies for, unless the intended subcontractor is an EME that has the capability to execute the contract.

PART 2

BID STRATEGY

Bid No.	
Bid Description	APPOINTMENT OF SERVICE PROVIDERS TO PROVIDE TRAINING FOR NEW FORKLIFT LICENSE, NEW REACH TRUCK LICENCE AND RENEWAL FORKLIFT LICENCES FOR PORT ELIZABETH PHARMACEUTICAL DEPOT OFFICIALS

1. Purpose

- 1.1. The Department of Health, Eastern Cape, is giving consideration to appointing a contractor for training to obtain new/ renewal licenses for forklift and new licenses for reach truck for officials at the PE Pharmaceutical Depot located in Port Elizabeth.
- 1.2. Bidders must bid for all items.
- 1.3. The successful bidder will be requested to deliver the goods ordered directly to where the goods are required.
- 1.4. The contract is rate / item price based and will be utilized on an as and when required principle.
- 1.5. If the supplier does not deliver after a month, there must be a reserve bidder (2nd highest, 3rd and there may be the forth- subject to the evaluation decision) that can be approached to take over the contract to deliver the goods required, within the 60 day validity period.

2. Institutions/Hospitals to be Supplied

- **PORT ELIZABETH PHARMACEUTICAL DEPOT**

3. Scope of Work

- 3.1. The suppliers will be requested to deliver the training course for New or Renewal Forklift licenses as well as New licenses for the reach truck.
- 3.2. The delivery addresses will be provided to the suppliers.

4. Declaration of The Bidders Ability to provide New and Renewal Forklift licenses and new reach truck licenses.

We hereby declare that we/I, _____ (name of the bidder), have the capacity and capability to supply and deliver **new and renewal licenses for forklifts and reach trucks**. I have tendered for, for the duration of the contract without interruptions. Failure to do so will result in the Supplier being blacklisted.

SIGNATURE OF BIDDER: _____

PART 3
SPECIFICATION

Bid No.	
Bid Description	APPOINTMENT OF SERVICE PROVIDERS TO PROVIDE TRAINING FOR NEW FORKLIFT LICENSE, NEW REACH TRUCK LICENCE AND RENEWAL FORKLIFT LICENCES FOR PORT ELIZABETH PHARMACEUTICAL DEPOT OFFICIALS
Closing Date	
Closing Time	13H00

SPECIFICATION FOR FORKLIFT AND REACH TRUCK TRAININGS.

NO.	ITEM/SERVICE DESCRIPTION	QUANTITY	UNIT OF MEASURE	COMPLY(YES/NO)	COMMENT
1	Renewals of Forklift Licence	09 (Officials)	eaches		
2	Training for New Forklift Licence	08 (Officials)	eaches		
3	Training for New Reach Truck Licence	04 (Officials)	eaches		

Part 4 – Schedule A

Pricing Schedule

SBD 3.2

PRICING SCHEDULE (ATTACH YOUR ORIGINAL QUOTATION)

NOTE: PRICE ADJUSTMENTS WILL BE ALLOWED AT THE PERIODS AND TIMES SPECIFIED IN THE BIDDING DOCUMENTS.

Name of bidder.....	Bid number
Closing Time 13:00	Closing date.....

OFFER TO BE VALID FOR 60 DAYS FROM THE CLOSING DATE OF BID.

NO.	ITEM/SERVICE NAME	ITEM/SERVICE DESCRIPTION	QUANTITY	UNIT PRICE (Incl VAT)	TOTAL PRICE
1	Training Renewals of Forklift Drivers licenses	• Training for the Renewal of Forklift drivers' licenses • Department should only provide Venue and Machines • Forklift license training course should be approved by the South African Qualifications Authority (SAQA) • Forklift license should be valid for 24 months from date of issue. • Participants must be provided with a certificate upon successful completion of the course. • Price to include travelling, meals and accommodation for the facilitator. • Must state duration of training i.e. number of days	09		
2	Training for Reach Truck licenses	• Training for Reach Truck Licences • Department should only provide Venue • Reach truck license training course should be approved by the South African Qualifications Authority (SAQA) • Reach truck license should be valid for 24 months from date of issue. • Participants must be provided with a certificate upon successful completion of the course. • Price to include travelling, meals and accommodation for the facilitator. • Must state duration of training i.e. number of days	04		
3	Training for Forklift Drivers licenses	• Training for Forklift drivers' licenses • Department should only provide Venue and Machines • Forklift license training course should be approved by the South African Qualifications Authority (SAQA) • Forklift license should be valid for 24 months from date of issue. • Participants must be provided with a certificate upon successful completion of the course. • Price to include travelling, meals and accommodation for the facilitator. • Must state duration of training i.e. number of days	08		
	SUBTOTAL				
	VAT 15%				
	TOTAL AMOUNT				

1. Required by:.....
- At:
2. Brand and model.....
3. Country of origin.....
- Does the offer comply with the specification(s)? *YES/NO
4. If not to specification, indicate deviation(s).....
5. Period required for delivery..... *Delivery:
Firm/not firm
6. Delivery basis

Please Note: All delivery costs must be included in the bid price, for delivery at the prescribed destination.

**** "all applicable taxes" includes value added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.**

***Delete if not applicable**

***In case of Arithmetic Error unit price will be used however, the supplier will be asked in writing to confirm the total bid price or correct the total if it affects the total bid price. The previous bid amount will remain on the bid document for audit purposes.**

PRICE ADJUSTMENTS:

A NON-FIRM PRICES SUBJECT TO ESCALATION

1. In cases of period contracts, non-firm prices will be adjusted (loaded) with the assessed contract price adjustments implicit in non-firm prices when calculating the comparative prices.
2. In this category price escalations will only be considered in terms of the following formula:

$$Pa = (1 - V)Pt \left(D1 \frac{R1t}{R1o} + D2 \frac{R2t}{R2o} + D3 \frac{R3t}{R3o} + D4 \frac{R4t}{R4o} \right) + VPt$$

Where:

Pa	=	The new escalated price to be calculated.
(1-V)Pt	=	85% of the original bid price. Note that Pt must always be the original bid price and not an escalated price.
D1, D2..	=	Each factor of the bid price e.g. labour, transport, clothing, footwear, etc. The total of the various factors D1, D2...etc. must add up to 100%.
R1t, R2t.....	=	Index figure obtained from new index (depends on the number of factors used).
R1o, R2o	=	Index figure at time of bidding.
VPt	=	15% of the original bid price. This portion of the bid price remains firm i.e. it is not subject to any price escalations.

3. The following index/indices must be used to calculate your bid price:

Index..... Dated..... Index..... Dated..... Index..... Dated.....

Index..... Dated..... Index..... Dated..... Index..... Dated.....

4. FURNISH A BREAKDOWN OF YOUR PRICE IN TERMS OF ABOVE-MENTIONED FORMULA. THE TOTAL OF THE VARIOUS FACTORS MUST ADD UP TO 100%.

FACTOR (D1, D2 etc. e.g. Labour, transport etc.)	PERCENTAGE OF BID PRICE

PRICES SUBJECT TO RATE OF EXCHANGE VARIATIONS

1. Please furnish full particulars of your financial institution, state the currencies used in the conversion of the prices of the items to South African currency, which portion of the price is subject to rate of exchange variations and the amounts remitted abroad.

PARTICULARS OF FINANCIAL INSTITUTION	ITEM NO	PRICE	CURRENCY	RATE	PORTION OF PRICE SUBJECT TO ROE	AMOUNT IN FOREIGN CURRENCY REMITTED ABROAD
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		
				ZAR=		

2. Adjustments for rate of exchange variations during the contract period will be calculated by using the average monthly exchange rates as issued by your commercial bank for the periods indicated hereunder: (Proof from bank required)

AVERAGE MONTHLY EXCHANGE RATES FOR THE PERIOD:	DATE DOCUMENTATION MUST BE SUBMITTED TO THIS OFFICE	DATE FROM WHICH NEW CALCULATED PRICES WILL BECOME EFFECTIVE	DATE UNTIL WHICH NEW CALCULATED PRICE WILL BE EFFECTIVE

Part 4 – Schedule B
Declaration of Interest

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:

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

.....
.....

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 consortium² 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

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

Part 4 – Schedule C
PREFERENCE POINTS CLAIM FORMS

SBD 6.1

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

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

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

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

a) The applicable preference point system for this tender is the 90/10 preference point system.

b) The applicable preference point system for this tender is the 80/20 preference point system.

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

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	
SPECIFIC GOALS	
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference

points for specific goals are not claimed.

- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. 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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)} \end{array}$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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:

$$\begin{array}{ccc} \mathbf{80/20} & \mathbf{or} & \mathbf{90/10} \\ \mathbf{Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} & \mathbf{or} & \mathbf{Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}} \right)} \end{array}$$

Where

Ps	=	Points scored for price of tender under consideration
Pt	=	Price of tender under consideration
Pmax	=	Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (c) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (d) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,
- then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.)

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Historically Disadvantaged Individuals	20%	20% (4)		
Women	20%	20% (4)		
Youth	20%	20% (4)		
Disability	20%	20% (4)		
Military Veterans	10%	10% (2)		
Locality	10%	10% (2)		
Total	100	20		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.1. Name of company/firm.....

4.2. Company registration number:

4.3. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX

4.4. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *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:

.....

.....