

REQUEST FOR PROPOSAL

Date of Request:

Request: The South African Medical Research Council (SAMRC) invites proposals from qualified service providers to provide Compensation for Occupational Injuries and Diseases (COID) Claims Administration and Related Services for a Period of three (3) Years, with the possibility of extension of a further two (2) years based on budget and performance.

RFP Number: 00100224385

For submission of proposals or any related queries Contact:

Supply Chain Management scm@mrc.ac.za

www.samrc.ac.za

REQUEST FOR PROPOSAL

PROVISION OF COMPENSATION FOR OCCUPATIONAL INJURIES AND DISEASES (COID) CLAIMS ADMINISTRATION AND RELATED SERVICES

1. INTRODUCTION

The South African Medical Research Council (SAMRC) invites suitably qualified and experienced bidders to submit proposals for the provision of Compensation for Occupational Injuries and Diseases (COID) claims administration, related risk-based technologies and support services.

The SAMRC intends to appoint preferred service provider based on the quality of proposals received, with a view to conclude a Service Level Agreement (SLA), where applicable, with the successful bidder(s). Responsive proposals (bids) from respondents (Service Providers [/ bidders) will be evaluated on functionality and as per government procurement conditions.

The appointed service provider must have an unquestionable track record and relevant experience, supported by positive feedback from existing and previous clients, and compliance with all mandatory and regulatory requirements.

To ensure effective contract management and service continuity, the service provider must be able to provide services through virtual platforms and, where required, visit SAMRC regional offices.

The SAMRC reserves the right to consider service providers who demonstrate commitment to environmental protection and corporate social investment in their business practices.

The service provider must be willing to partner with the SAMRC by providing services as required and advising the SAMRC on improvements to strengthen service delivery, maintain alignment with current trends, and ensure continued compliance with applicable legislation.

2. PURPOSE

Request: The SAMRC invites proposals from qualified (highly competent) service providers to provide

- i) Compensation for Occupational Injuries and Diseases (COID) Claims Administration
- ii) COID annual assessments services and
- iii) where applicable ad-hoc risk bases technologies towards compliance with Occupational Health Safety and the environment.

This service requirement is for three (3) years with the possibility of a further extension by two (2) years, at the sole discretion of the SAMRC subject to budget and performance.

- 3.1.** The South African Medical Research Council (SAMRC) is a Schedule 3A public entity in terms of the Public Finance Management Act, 1999 (PFMA). SAMRC has been enacted through the South African Medical Research Council Act, 1991, and reports directly to the Department of Health. As a schedule 3A public entity, SAMRC is obligated to comply with the procurement processes under the Public Finance Management Act (PFMA). SAMRC's core mandate is to promote the improvement of the health and quality of life of the South African population through research, development, and technology.
- 3.2.** The SAMRC's head office is in Cape Town (Western Cape Province) and it is also represented in Gauteng and KwaZulu-Natal Provinces through regional offices.
- 3.3.** SAMRC has seven campuses and several satellite research sites with diverse business activities i.e. offices, biochemistry and microbiology laboratories, health research clinics, animal research centres, and tenants renting space. Further information about SAMRC can be found on the SAMRC webpage, www.samrc.ac.za.
- 3.4.** COID Claim History (Medicals and Disablements)
 - 3.4.1. Claims Period: Jul 1995 to Mar 2026
 - 3.4.2. Approx. claims over 31 years: 293
 - 3.4.3. Approx. claims per year: 10
 - 3.4.4. In addition to above claims, incidental exposures were reported to Office of COID in 2016 to cover future consequences: 112
- 3.5.** COID Industry Code: SAMRC falls under Class XXI, Code 2110. The business of running hospitals; maternity or nursing homes; medical research laboratories; asylums, sanatoria; clinics; malaria health committees; the business of veterinary surgeon; dog breeder; bird fancier; domestic pet dealer; the business of conducting animal hospitals and homes

4. SCOPE OF WORK

Service provider must be a reputable company with a traceable history within the insurance and risk-based industry in administration of Compensation for Occupational Injuries and Disease (COID) claims.

4.1. BROAD OVERVIEW OF SERVICES REQUIRED

- 4.1.1. Compensation for Occupational Injuries and Disease (COID) claims Management and Administration Services**
 - 4.1.1.1. Compensation claims administration and management
 - 4.1.1.2. Company registration and business classification with Compensation Fund of DoEL
 - 4.1.1.3. Assist SAMRC with matters pertaining to the annual submission of employer's return of earnings and payment of annual assessments in respect of the COIDA
- 4.1.2. Training**
 - 4.1.2.1. Awareness, Inductions and Training related to COID Administration processes and internet-based software system (accessible electronic software system used by service for capturing and managing COID claims)
 - 4.1.2.2. Training in COID Act, HSE legislative requirements and related technologies, as and when needed
- 4.1.3. Provision of HSE Risk risk-based technologies** related to Compensation and Occupational Injuries and Diseases Act (COIDA), Occupational Health and Safety Act (OHSA), Environmental and Labour Laws, where applicable

5. CORE SERVICES AND DELIVERABLES

The appointed service provider will be required to provide the following services and deliverables for the duration of the contract, in line with the approved scope of work and agreed Service Level Agreement:

5.1. ADEQUATE RESOURCE REQUIREMENTS AND OBLIGATIONS FOR SERVICE PROVIDER

- 5.1.1. Established Mechanism: Service Provider must have established mechanisms and employs dedicated personnel for;
 - i) administering COID Claims,
 - ii) and consults and evaluates all matters pertaining to the annual submission of return of earnings and payment of annual on behalf of the client (SAMRC)
- 5.1.2. Electronic Software System: Service Provider must have a developed electronic software system for the purposes of administering occupational injuries and disease claims (IOD/OD) (COID Claims). This software system should enable the client (SAMRC) with secure access for claim submission, document upload, progress tracking, reporting, statistics by authorized SAMRC users.
- 5.1.3. Service Provider (bidder) must be able to meet the required services as per scope of services
- 5.1.4. Successful Service Provider as the new custodian of SAMRC History COID claim data, will be responsible for transferring COID claims and related information from existing custodian and upload the information on the Service Provider' (bidder') electronic system

5.2. COID CLAIM ADMINISTRATION AND MANAGEMENT

- 5.2.1. Provide full administration, management and follow-up of COID claims, relating to occupational injuries and occupational diseases, submitted by the SAMRC.
- 5.2.2. Registration of occupational injuries and disease on accessible systems of the service providers and COID e.g. CompEasy
- 5.2.3. Inform SAMRC of the registered claim number within 24-48 hours of reported injury, unless claim was submitted late or non-responsive COID Systems (CompEasy)
- 5.2.4. Review claim documentation and notify the SAMRC of incomplete, outstanding or additional information required for processing and adjudication.
- 5.2.5. Ensure that pre-assessment advice and adjudication decisions are recorded on the electronic software system against the applicable claims.
- 5.2.6. Submit claim documentation received from the SAMRC to the Compensation Fund
- 5.2.7. Follow up with the Compensation Fund on adjudication outcomes, claim re-openings, payments, awards, temporary total disablement, permanent disability and pensions.
- 5.2.8. Assist SAMRC with refunds/ rebates relating to COID claims.
- 5.2.9. Provide monthly reports (electronic updates), and as needed, related to claim status reports, including progress updates, statistics, outstanding actions, claims pending adjudication, reopened claims and claims requiring SAMRC intervention.
- 5.2.10. Provide monthly to the SAMRC on adjudication decisions, payments or awards issued by the Compensation Fund.
- 5.2.11. Process COID claims that occurred prior to the contract commencement date, where required by the SAMRC.
- 5.2.12. Successful Service Provider as the new custodian of SAMRC History COID claim data, will be responsible for transferring COID claim related information from existing custodian and upload the information onto the Service Provider's electronic system
- 5.2.13. Migration, upload and management of historical SAMRC COID claim information from the existing custodian or previous service provider, where applicable
- 5.2.14. Guide SAMRC and facilitating re-opening of closed cases with the Compensation Fund
- 5.2.15. Provide any additional services related to compensation insurance claims, as required and agreed with the SAMRC.

5.3. ANNUAL ASSESSMENTS OF EARNINGS

- 5.3.1. As per instruction assist SAMRC with matters pertaining to the annual submission of employer's return of earnings and payment of annual assessments in respect of the COIDA.
 - 5.3.1.1. Advise the SAMRC on the correct method for completing annual returns of earnings
 - 5.3.1.2. Review assessment calculations for accuracy and correctness.
 - 5.3.1.3. Submission of Annual Return Assessments to Compensation Fund, and facilitating the issuing of the Letter of Good Standing
 - 5.3.1.4. Assist with registrations, reclassifications, tariff queries and correction of historical assessments, and negotiations with DoEL, where necessary
 - 5.3.1.5. Liaise and negotiate with the Compensation Commissioner, regarding annual assessments and tariff reductions
 - 5.3.1.6. Assist SAMRC with refunds/ rebates relating to returns of earnings.
 - 5.3.1.7. Requesting from Compensation Fund, assessment documentation, payment chronology and any credit balance to be paid to an Employer's account on Fund
 - 5.3.1.8. Provide SAMRC with all the relevant notifications of DoEL related to annual assessments
 - 5.3.1.9. Provide any additional services related to Annual assessment, as required and agreed with the SAMRC

5.4. ENGAGEMENT AND MEETINGS

- 5.4.1. Provide services through continual engagement via email and telecommunication / virtual platforms related to COID claims, annual assessment, audits and ad hoc services.
- 5.4.2. Must be available for annually meetings, and as needed, on progress, performance and status of contract.

5.5. CONFIDENTIALITY, LEGALITIES AND INFORMATION CONTROL

- 5.5.1. Ensure secure, POPIA-compliant management, storage, transfer and protection of all SAMRC claim-related, medical, employee and institutional information.
- 5.5.2. Maintain a repository of relevant COID legislations, statutory forms and templates.
- 5.5.3. Maintain a repository of all COID claim documentation and annual assessment records of SAMRC for duration of contract
- 5.5.4. Notify SAMRC of relevant COID legislation and notifications
- 5.5.5. Provide an updated list of medical practitioners or medical facilities able to attend to injuries on duty, where such information is maintained by the service provider
- 5.5.6. Responsible for final handover of all SAMRC-related claim records, reports, outstanding matters and data in a usable format at the end of the contract or upon termination.
- 5.5.7. Sign all the necessary agreement(s) in protection the client's information i.e. non -disclosure agreement, and power of attorney, as any related legal documents
- 5.5.8. To honour any existing SAMRC COID claims administration contract that has not yet expired, where applicable

5.6. AWARENESS, INDUCTION, TRAINING

- 5.6.1. Provide Initiation training: Individualised training sessions with client (SAMRC) to COID Processes and Systems of the Service Provider; including the utilisation and applying of software system
- 5.6.2. Provide continual awareness, induction and training material relating to the electronic claims system, COID claims processes, and annual assessments, where applicable
- 5.6.3. Provide additional training in COID Act, HSE and labour legislations and risk technologies, where applicable.

5.7. HSE RISK-BASED TECHNOLOGIES

- 5.7.1. Provide Ad hoc HSE/EHS risk-based services, including legal compliance registers, document/system reviews and related advisory services, where applicable and as agreed to between SAMRC and Service Provider.

6. QUERIES RELATING TO PROPOSALS AND QUOTATIONS

- 6.1. Potential Service Providers (bidders) can contact **Supply Chain Management** via email address scm@mrc.ac.za for additional information to prepare the proposal and quote.
- 6.2. All technical and other related enquiries will be accepted up until the cut off time of **16:00 (SAST) on 28 September 2026**, no enquiries will be accepted or responded to beyond this time and date.
- 6.3. Please include the RFP number in the subject line of all email correspondence.
- 6.4. No telephonic enquiries will be responded to.

7. CLOSING DATE FOR SUBMISSIONS

- 7.1. The closing date for submissions is **11:00 (SAST) on 02 October 2026**

8. REQUIRED INFORMATION

Information to be submitted upfront and deemed to form part of the proposal and quotation to qualify as a vendor to provide the service.

Table 1. Required Information for evaluation purposes

REQUIREMENTS	APPENDICES	AVAILABLE & ATTACHED (Yes/ No)
COMPANY INFORMATION	1	
1. Brief overview and of company: 2. Head office & Regional offices 3. Core business hours 4. Company organogram 5. Account manager and key technical staff who will dealt COID, ink Claim at the time when proposal is submitted 6. Key contact Info 7. National and Regional Footprint offered, particular for Gauteng, Western Cape, and Kwa-Zulu Natal regions.		
8. Operational status: 9. Number of years in business 10. Experience and history of COID administration and Risk based technologies, and service delivery process		
SERVICES	2	
Project plan for services offered, including compensation technologies and electronic software system for processing claims for clients.		
11. COID Technologies: Compensation Claim Administration Function		
12. COID Technologies: ROE Assessment Administrative Function		
13. Electronic Software for COID Administration & Management		
14. Awareness, Induction and Training Services		
15. HSE(EHS) risk-based technologies		
16. Quality systems and good practice information related to services offered, where applicable		
17. Health, Safety and Environment Policy or statement of commitment to Health, Safety and Environment		
REFERENCES	3	
18. Full contact details of 3 or more references including relevant information such as: • Company name • Contact person and contact detail - Tel and Email • Nature of service provided • Service period (commencement date and duration of contract) • Where possible provide summary of the technical, quality and professional business abilities in providing the service to the customer • The provided references must be contactable and on the Customers's letterhead or in a spreadsheet		
AGREEMENTS	4	
19. Submit a draft copy of Master Service Agreement		
QUOTATION	5	
20. Provision of quotation(s): • Quotation for scope of work:		

	○ Annual or monthly fees pricing schedule ○ Rate based pricing schedule where applicable		
--	---	--	--

9. RETURNABLE DOCUMENTS FOR ELIGIBILITY ASSESSMENT

- 9.1.** Registration with the Central Supply Database (CSD) of the South African government
- 9.2.** Valid tax clearance or PIN
- 9.3.** Company registration documents
- 9.4.** BBBEE status
- 9.5.** Certified Copy of Broad Based Black Economic Empowerment (B-BBEE) certificate issued by SANAS accredited Agency
- 9.6.** Completed SBD documents (Attached)
- 9.7.** Certificate of Authority for Joint Ventures (where applicable)
- 9.8.** Letter of Good Standing with the Compensation Fund of DoEL
- 9.9.** Required information as per table 1 for evaluation purposes
- 9.10.** Certified Copy of Public-Environmental Liability Insurance

10. EVALUATION CRITERIA

- 10.1.** Functionality will be evaluated against COID claims administration experience, electronic system capability, methodology and implementation plan, POPIA/data security measures, key personnel and contactable references.
- 10.2.** Only Service Providers (bidders) who achieve the minimum functionality threshold of 75% will proceed to price and specific goals evaluation.

Table 2. Evaluation / selection guidance criteria

Criteria	Ref No.	Description	Weight (%)	Min pre-qualification on percentage	Preference points system
Functionality (Total = 100%)	1. Company profile and relevant experience	Company profile, core business, 5 – 10 years of experience and demonstrable track record in COID claims administration, occupational injury and disease claims, annual assessments, compensation insurance or related risk-based services.	20	75%	
	2. Key personnel, account management and technical capacity	Availability of suitably experienced account manager and dedicated key technical staff to manage COID claims, annual assessments, system support, execute technologies, reporting, training and related advisory services.	20		
	3.Methodology, implementation plan and service delivery approach	Clear approach to onboarding, data migration, claim administration, monthly reporting, annual assessments, escalation of outstanding matters, communication with SAMRC and continuity of service over the contract period. Provision of compensation and ad-hoc risk technologies services.	30		
	4. Electronic claims system and reporting capability	Ability to provide an electronic system for claim submission, tracking, status updates, reporting, statistics, secure access for authorized users and management of historical and current claim records.	15		
	5. References for similar services	At least three contactable references for similar COID claims administration, occupational injury and disease claims, annual assessment, compensation insurance or related risk-based services.	15		
Price					80
Specific Goals					20
Total					100

Table 3. Rating guideline for functionality criteria

**NB: Where the rating guideline above does not provide for the information provided by the Service Provider (bidder), the evaluator reserves the right to allocate closest or any score as he/she sees fit*

Functionality criteria Ref.	Rating Guidelines					
Rating	Unacceptable (U) = 0	Poor = 4 points	Average = 8 points	Satisfactory = 12 points	Good = 16 points	Excellent = 20
1. Company Details	No company profile or relevant experience provided.	Less than 3 years' relevant experience or very limited evidence provided.	3-5 years' relevant experience with limited evidence of similar services.	5-7 years' relevant experience with adequate evidence of similar services rendered.	7-10 years' relevant experience with substantial evidence of successful service delivery in similar environments.	More than 10 years' experience in COID claims administration, compensation insurance, annual assessments, and related services with extensive proven track record and supporting evidence.
2. Experience, Technical Capacity	No evidence of key personnel or technical capacity provided.	Key personnel lack relevant experience, qualifications or capacity to deliver the required services.	Limited technical capacity, inadequate staffing levels or insufficient evidence of competence.	Account manager and technical personnel identified with acceptable qualifications and experience sufficient to perform the services.	Dedicated account manager and suitably experienced technical team with relevant qualifications and adequate support structure.	Dedicated account manager and highly experienced technical team with relevant qualifications, certifications and extensive COID administration experience. Clear resource allocation and support structure provided.
Rating	Unacceptable (U) = 0	Poor = 6 points	Average = 12 points	Satisfactory = 18 points	Good = 24 points	Excellent = 30
3. Methodologies, Software, Quality Services	No methodology or implementation plan submitted.	Poor methodology with significant gaps that may impact delivery.	Methodology partially addresses requirements and lacks sufficient detail in critical areas.	Adequate methodology addressing the key requirements with reasonable implementation approach.	Well-defined methodology addressing all major requirements with clear timelines and service delivery processes.	Comprehensive methodology covering onboarding, claim administration, annual assessments, reporting, technology-enabled services, escalation procedures, risk management, continuity planning and performance monitoring.
Rating	Unacceptable (U) = 0	Poor = 5 points	Average = 7 points	Satisfactory = 10 points	Good = 12 points	Excellent = 15
4. Electronic claims system and reporting capability	No electronic claims management system provided.	Basic system offering that does not adequately support the required service scope.	Limited system functionality with notable gaps in tracking, reporting or access management.	Functional electronic system meeting minimum requirements for claims management and reporting.	Mature electronic system with robust claim tracking, reporting and secure user access functionality.	Comprehensive electronic claims management system with online submission, real-time tracking, dashboards, automated reporting, historical record management, audit trails, user permissions and advanced analytics.
5. Contactable References	No references	Portfolio of 1 contactable reference with a similar scope.	No rating	Portfolio of 2 contactable references with a similar scope.	No rating	Portfolio of 3 or more contactable references with a similar scope.

11. Pricing Schedule

Table 4. Summary of Pricing Schedule

#	Deliverable / Service	Pricing Basis	Quantity / Unit	Price Excluding VAT	Annual Escalation %
1.	Annual fee for COID management administration Services: Breakdown: - Annual Fee for services fees to cover following, but not limited to: - COID claims administration, management and follow-up - Monthly reports (and as needed) related to claim status, statistics and outstanding actions and tasks - Support for annual assessment of return of earnings support - Access to electronic software system of service provider for COID Administration - Initiation to processes and systems of service provider - Engagement and meetings with service provider - Engagements with DoEL by Service Provider (as POA) on submissions and progress e.g. COID Claims, COID notifications, and ROE assessments	Annual fee	1		
2.	Annual Administration fee relating to the account and contract between SAMRC and Service Provider	Annual fee	1		
3.	Migration and upload of historical SAMRC COID claim and assessment records, where applicable (Once of fee covering the migration of approx. 450 claims from exiting custodian and CompEasy)	Once-off fee for	1		N/A
4.	Training, induction and awareness on COID administration processes and Software system when needed. Projection: - Sessions: approximately four p.a. 1.1. COID Claim training 1.2. ROE training 1.3. Software System Sessions - Sessions might include 4 to 12 person per session - Refresher session may be requested as new employees join the SAMRC	Rate per session / per person	1		
3	Training in COID Act and related occupational injury and disease management, where applicable (one day course)	Rate per person	1		
4	Disbursement costs				
4.1	Travel and accommodation as required and pre-approved by SAMRC. Cape Town Campus		1		
4.2	Travel and accommodation as required and pre-approved by SAMRC. Durban Campus		1		
4.3	Travel and accommodation as required and pre-approved by SAMRC. Pretoria Campus		1		
	Sub-Total				
	Add VAT 15%				
	TOTAL				

ANNEXURE B: SAMRC REQUIREMENTS FOR APPOINTED SERVICE PROVIDER (BIDDER)

B.1 Regulatory Framework

1. The successful Service Provider shall comply with all applicable legislation, policies and rules relevant to the scope of services offered.
2. Successful Service Provider shall comply with all relevant provisions of the Occupational Health and Safety Act (OHSA), Compensation for Occupational Injuries and Diseases Act (COIDA), Protection of Personal Information Act (POPIA), and any other applicable legislation in rendering COID claims administration and related services to the SAMRC.
3. The successful Service Provider shall provide a Health, Safety and Environment Policy or statement of commitment to Safety, Health and Environment, where applicable.
4. The successful Service Provider shall annually provide a letter of good standing with the Compensation Commissioner for duration of contract.

B.2 HEALTH AND SAFETY CONSIDERATIONS

1. The successful Service Provider must maintain adequate internal controls, insurance cover and operational processes to fulfil its obligations under the applicable legislation for the duration of the agreement.
 - 1.1. Successful Service Provider shall ensure that the health and safety of any person on SAMRC premises is not endangered by the conduct or activities of the Service Provider.
 - 1.2. Successful Service Provider shall provide and maintain a safety file for periodic review by SAMRC for the duration of the agreement, where applicable to the services rendered.
 - 1.3. Successful Service Provider shall maintain an HSEQ risk register for the services rendered to SAMRC for the duration of the agreement, where applicable.
 - 1.4. Hazards particular to a project by virtue of location and operations at SAMRC Premises might include research facilities dealing with hazardous chemicals such as flammable, corrosives, and toxic and low activity radionuclides, and with bio safety level 2 and facilities as well as drug resistant TB (Tuberculosis) cultures and incubators, animals (primates and rodents) in cages, and horses in camps. These sites may only be entering with permission of the responsible person and where required the necessary access and protection controls to be adhered with
2. Successful Service Provider shall acknowledge its responsibilities as an employer in respect of its employees, subcontractors and outsourced service providers and shall ensure compliance with applicable labour, compensation, health and safety, information protection and related legal requirements.

B.3 Medical Screening and Tuberculosis

1. As per SAMRC protocol, employees of successful Service Provider must be willing to undergo TB tests prior entering certain areas in protecting our research animals / participants. The TB testing shall be done as needed and at intervals determined by SAMRC protocol.
2. The cost of this additional TB testing will be an ad hoc fee which must NOT be included in the bid pricing.
3. In addition to this medical screening of TB, the SAMRC may request to review the legislative medical fitness documentation related to employees servicing the SAMRC as part of the occupational health plan of the Service Provider (bidder). The Service Provider is responsible and accountable for ensuring the medical fitness of their staff in compliance with regulatory requirements.

B.3 Glossary: Key Definitions Related to COID Claims Administration

1. **COID claim** refers to a claim submitted in terms of the Compensation for Occupational Injuries and Diseases Act for an occupational injury or occupational disease.
2. **Compensation Fund** refers to the statutory fund responsible for receiving, adjudicating and administering qualifying claims submitted under COIDA, where applicable.
3. **Return of Earnings** refers to the annual employer declaration submitted for assessment purposes in accordance with COIDA requirements.
4. **Annual assessment** refers to the assessment issued to an employer based on declared earnings and applicable risk classification.
5. **Electronic claims system** refers to the Service Provider's (bidder's) secure platform used to submit, track, report and manage COID claims, supporting documents, claim status updates and management information.
6. **Claim documentation** refers to all forms, reports, medical documents, correspondence, decisions, awards, payment records and supporting information relating to a COID claim.
7. **CompEasy** refers to the online claims management platform introduced by South Africa's Compensation Fund, of Department of Employment and Labour, in October 2019 to replace the older Umehluko system.