



**National
Research
Foundation**

Invitation to Quote

**YOU ARE HEREBY INVITED TO QUOTE FOR REQUIREMENTS LISTED IN
THIS DOCUMENT**

**QUOTE NUMBER: RFQ/SAEON/ELWANDLE/HEALTH RISK
ASSESSMENT AND OCCUPATIONAL HYGIENE
SURVERY/158/2025**

SHORT DESCRIPTION OF REQUIREMENT

**APPOINTMENT OF A SERVICE PROVIDER TO PROVIDE A HEALTH RISK
ASSESSMENT AND OCCUPATIONAL HYGIENE SURVEYS, IN TERMS OF
VARIOUS REGULATIONS WITHIN THE OCCUPATIONAL HEALTH AND SAFETY
ACT, 1993 (ACT 85 OF 1993).**

**Fraud alert! It is common for scammers to call bidders pretending to be NRF's employees and offering to swing tenders your way for a fee.
Do not fall for it, it is a scam!**

**The NRF would never offer payment or any other consideration in return for the favourable consideration of a bid.
Please report any suspected acts of fraud or corruption to the following toll-free number
- 0800 701 701 or SMS 39772.**

INVITATION TO QUOTE (SBD 1A)

Quote Number		RFQ/SAEON/ELWANDLE/HEALTH RISK ASSESSMENT AND OCCUPATIONAL HYGIENE SURVERY/158/2025	
Compulsory briefing session / Site visit (if any)		N/A	
Closing Date and Time (as per NRF systems)		16 January 2026 at 11h00 am	
HIGH LEVEL SUMMARY OF REQUIREMENTS:			
The SAEON seeks to appoint professional services of an Approved Inspection Authority, duly registered with the Department of Employment Labour, to undertake a Health Risk Assessment and Occupational Hygiene Surveys, in terms of various Regulations within the Occupational Health and Safety Act, 1993 (Act 85 of 1993).			
RESPONSE DOCUMENTS ARE DELIVERED VIA EMAILS:			
EMAIL DELIVERY AS FOLLOWS:			
SCM@saeon.nrf.ac.za			
ONLY PDF DOCUMENTS ARE ACCEPTABLE.			
EMAILS ADDRESS:		Electronic submission	
Bidding procedure enquiries may be directed in writing to:		Technical information may be directed in writing to:	
Section	SCM	Section	Safety, Health, Environmental and Risk Function
Contact person	Lucia Maluleke	Contact person	Jescica Spannenberg
E-mail address	SCM@saeon.nrf.ac.za	E-mail address	jm.spannenberg@saeon.nrf.ac.za

SUPPLIER INFORMATION					
Name Of Bidder					
Postal Address					
Street Address					
Telephone Number					
Code		Number			
Cell Phone Number					
Code		Number			
Facsimile Number					
Code		Number			
E-Mail Address					
VAT Registration Number					
Tax Compliance Status	Tax Compliance System PIN		OR	Central Supplier Database No.	MAAA
B-BBEE Status Level Verification Certificate		Tick Applicable Box. <input type="checkbox"/> Yes <input type="checkbox"/> No		B-BBEE Status Level Sworn Affidavit	Tick Applicable Box. <input type="checkbox"/> Yes <input type="checkbox"/> No
[A B-BBEE status level verification certificate/ sworn affidavit (for EMEs & QSEs) must be submitted in order to qualify for preference points for B-BBEE]					
Are you the accredited representative in South Africa for the goods /services/works offered?		<input type="checkbox"/> Yes <input type="checkbox"/> No [If yes enclose proof]		Are you a foreign-based supplier for the goods/services/works 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?					<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the entity have a permanent establishment in the RSA?					<input type="checkbox"/> Yes <input type="checkbox"/> No

SUPPLIER INFORMATION	
Does the entity have any source of income in the RSA?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Is the entity liable in the RSA for any form of taxation?	<input type="checkbox"/> Yes <input type="checkbox"/> 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.	

TERMS AND CONDITIONS FOR BIDDING (SBD 1B)	
1. BID SUBMISSION:	
1.1	Bids must be 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. Bid pages are bound to minimise risk of lost pages.
1.3	This bid is subject to the Preferential Procurement Policy Framework Act, 2000 and the General Conditions Of Contract (GCC) with its special conditions of contract, and, if applicable, any other legislative requirements.
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 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

TERMS AND CONDITIONS FOR BIDDING (SBD 1B)	
	persons in the service of the state.
3. TWO ENVELOPE SYSTEM	No
4. VALIDITY PERIOD FROM DATE OF CLOSURE	90 Days
5. THE BIDDING SELECTION PROCESS	
<p><u>Stage 1 – Compliance to submission requirements</u></p> <p>Bidders warrant that their proposal document has, as a minimum; the specified documents required for evaluating their proposals as set out in the Returnable Document List and conform to all the terms, conditions, and specifications as set out in this document.</p>	
<p><u>Stage 2 – Evaluation of Bids against Technical Specifications</u></p> <p>Bidders achieving the minimum threshold in the specification to enter the Price/Preference scoring stage:</p>	
<p><u>Stage 2A – Evaluation of Bids against Specifications including Quality</u></p> <p>The NRF evaluates each bidder's written response to the specifications issued in accordance with published evaluation criteria set as in Section D.</p>	
<p><u>Stage 2B – Due Diligence Interviews or Proof of Delivery/Concept against Specifications</u></p> <p>Where circumstances justify it, the NRF conducts interviews with shortlisted bidders for them to present further information or provide further proof to the evaluation committee. In these cases, the National Research Foundation provides the areas of concern to the shortlisted bidders to address in their presentations with this document and, where necessary, may provide further areas of concern to the shortlisted bidders at this stage.</p>	
<p><u>Stage 2C – Due Diligence Research</u></p> <p>The National Research Foundation confirms the recommended bidder(s)'s reference letters with referees to confirm the recommendation(s).</p>	
<p><u>Stage 3 – Price/Preference Evaluation</u></p> <p><u>Basis of fair competition:</u></p> <p>The NRF compares each bidder's pricing proposal on an equal and fair comparison basis equitable to all bidders, taking into account all aspects of the bid's pricing requirements including the application of fair pricing tests as set out below in the section "Insufficiency of Funds".</p> <p><u>Ranking of the bidders pricing:</u></p> <p>The NRF ranks the qualifying bids on price with lowest priced Bid receiving the maximum points (either 80 or 90) and the remainder ranked in relation to the lowest priced bid. The NRF adds the bidders' claimed preference points as verified to the submitted preference claim form (SBD 6.1) to provide the final ranking for the award decision.</p>	
<p><u>Stage 4 – Checking Tax Compliance</u></p>	

TERMS AND CONDITIONS FOR BIDDING (SBD 1B)

Stage 4A – Taxpayers Resident in South Africa

The NRF notifies the recommended bidder in writing where their tax compliance check reflects that they are non-compliant and provides the recommended bidder seven (7) working days to submit written proof from SARS of their tax compliance status or proof that they have made an arrangement with SARS to meet their outstanding tax obligations. Failure to deliver such written evidence of compliance results in the rejection of that recommended bid.

Stage 4B – Non-Resident Foreign Bidders

When foreign bidders are submitting a bid, they complete all sections of the SBD1, especially the tax questionnaire. The NRF submitted the Foreign Bidder's completed SBD1 to the South African Revenue Service to obtain from the South African Revenue Service the Confirmation of Tax Obligations letter. Where South Africa Revenue Services does not issue the letter, Stage 4A applies in clearing the reason for not receiving the letter.

Stage 5 – Award and Contract Signing

The NRF nominates the bidder with the highest combined score for the contract award subject to the bidder having supplied the relevant administrative documentation.

6. ACKNOWLEDGEMENT OF READING EACH PAGE

The bidder warrants by signature in this document that the bidder has read and accepts each page.

7. CENTRAL SUPPLIER DATABASE REGISTRATION

Bidders are requested to register on the Central Supplier Database and to include in their bid their Master Registration Number (Supplier Number) in order to enable the NRF to verify the supplier's tax status on the Central Supplier Database.

8. CLARIFICATION

If the respondent wishes to clarify aspects of this request or the acquisition process, they contact the officials listed under the enquiries section above. The National Research Foundation does not provide the origin of the request to any party.

9. RESPONSE PREPARATION COSTS

The NRF is not liable for any costs incurred by a bidder in the process of responding to this Bid Invitation, including on-site presentations.

10. COLLUSION, FRAUD AND CORRUPTION

Any effort by Bidder/s to influence evaluation, comparisons, or award decisions in any manner will result in the rejection and disqualification of the bidder concerned.

11. FRONTING

The NRF, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes where applicable, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in the bid documents. The onus is on the bidder to prove that fronting does not exist, should the National Research Foundation establish and notify the bidder of potential breaches of any of the fronting indicators as contained in the Department of Trade and Industry's "Guidelines on Complex Structures and Transactions and Fronting". Failure to do so within a period of 7 days from date of notification will invalidate the bid/contract and may also result in the restriction of the bidder to conduct business with the public sector for a period not exceeding 10 years, in addition to any other remedies the NRF may have against the bidder concerned.

12. DISCLAIMERS

The NRF has produced this document in good faith. The NRF, its agents, and its employees and associates do not warrant its accuracy or completeness. The NRF makes no representation, warranty, assurance, guarantee or endorsements to any provider/bidder concerning the document, whether with regard to its accuracy, completeness or otherwise and the NRF shall have no liability towards the responding service providers or any other party in connection therewith.

13. CANCELLATION OF THE QUOTATION PRIOR TO AWARD

Procurement not required: The NRF cancels the Bid Invitation prior to making an award if due to changed circumstances there is no need for the specified procurement in the document.

No Acceptable Quotations: The NRF cancels the Quotation Invitation prior to making an award if it receives no acceptable bids i.e. that do not meet the minimum requirements set out in this document.

Invalid Bid Procedure: The NRF cancels the Quotation Invitation prior to making an award if a material irregularity occurred in the bid process.

Insufficiency of Funds or Quotations not within a fair price range: The NRF cancels the Quotation Invitation prior to making an award if the funds are no longer available to cover the total envisaged expenditure or if the price offered by the bidder scoring the highest points is not market related.

The NRF conducts fair pricing tests to arrive at an opinion of reasonableness of the bid price offered. Where these tests reflect pricing outside of the established fair price range, the evaluators may recommend price negotiation. The NRF only negotiates price, and no other component, with the winning bidder or, where that bidder refuses negotiation, with the next ranked bidder in the price/preference ranking until a market related price is achieved.

SBD 1 SIGNATURE

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:

SCOPE OF WORK

The scope of work is to formally request the professional services of an Approved Inspection Authority (AIA), duly registered with the Department of Employment Labour, to undertake a Health Risk Assessment (HRA) and Occupational Hygiene Surveys. These required assessments and surveys, in terms of various Regulations within the Occupational Health and Safety Act, 1993 (Act 85 of 1993), include:

- Illumination Survey
- Noise Zoning and Monitoring Survey
- Chemical Monitoring Survey
- Ventilation Survey
- Facilities Hygiene Survey
- Ergonomics Assessment
- Indoor Air Quality Assessment
- Health Risk Assessment Review

INTRODUCTION TO THE NRF

The National Research Foundation Act, Act 23 of 1998, establishes the National Research Foundation ("NRF") as the juristic person that makes this bid invitation and will contract with the awarded bidder. The Public Finance Management Act classifies the organisation as a Schedule 3A Public Entity.

Introduction to the NRF's Business Unit and its Site Requesting this RFQ

The South African Environmental Observation Network (SAEON) functions as a long-term facility for environmental observation and research. SAEON maintains a distributed network comprising different sites across South Africa. One of these sites, the Elwandle Node, encompasses a research network that covers the major marine ecosystems and is located in **Gqeberha**, South Africa.

The Elwandle Node supports a diverse range of activities, centered on academic research and administrative functions. It handles administrative duties and general office work. The academic and research activities take place in housing offices, laboratories, and additional specialised research space in its extension, including a dedicated open-plan lab for postgraduate work. There is a workshop area for practical and logistical support, particularly for field trips. Furthermore, the Boat shed facilitates activities related to marine operations, primarily through vessel and fuel storage.

CONTEXT OF THIS PROCUREMENT

The SAEON seeks to appoint professional services of an Approved Inspection Authority, duly registered with the Department of Employment Labour, to undertake a Health Risk Assessment and Occupational Hygiene Surveys, in terms of various Regulations within the Occupational Health and Safety Act, 1993 (Act 85 of 1993).

CONTRACT PERIOD

Once off

DESCRIPTION OF GOODS/DETAILED SPECIFICATION

The purpose of this procurement is to formally request the professional services of an Approved Inspection Authority, duly registered with the Department of Employment Labour, to undertake a Health Risk Assessment and Occupational Hygiene Surveys, in terms of various Regulations within the Occupational Health and Safety Act, 1993 (Act 85 of 1993).

. These required assessments and surveys include the following:

- Illumination Survey
- Noise Zoning and Monitoring Survey
- Chemical Monitoring Survey
- Ventilation Survey
- Facilities Hygiene Survey
- Ergonomics Assessment
- Indoor Air Quality Assessment
- Health Risk Assessment Review

1. INITIAL ENGAGEMENT

- 1.1. Meet with client nominated representatives to understand operations, site size, and company-specific risks as and when required.

2. ILLUMINATION SURVEY

- 2.1. **Measurement Standards:** Average illuminance levels shall be measured in all occupied areas on site. All measurements must strictly adhere to the requirements specified in Table 4: Minimum maintained average illuminance values for interior workplaces of the Physical Agents Regulations (2024).

- 2.2. **Time of Assessment:**

- 2.2.1. Day-time illuminance levels.
- 2.2.2. Night-time illuminance measurements shall be performed in areas operational during night hours, where applicable.
- 2.2.3. **Procedure:** The illumination survey shall be executed in accordance with the recommended standards and/or methods prescribed in SANS 10114 – 1: 2005, as referenced and included in the Physical Agents Regulations (2024).

3. NOISE MONITORING SURVEY

- 3.1.** The active operational areas within the site will be subjected to a formal noise zoning survey, as mandated by the Noise Exposure Regulations (2024). The scope of work shall include:
- 3.1.1. Area Noise Measurement:** Noise rating levels will be measured using an approved noise dosimeter. A statistically representative number of measurements shall be obtained over a sufficient period to accurately represent the area/source noise profile.
 - 3.1.2. Personal Noise Dosimetry:** Personal noise dosimetry will be performed on a minimum of two (2) selected, priority workers to quantify individual worker exposure to noise rating levels.
 - 3.1.3. Evaluation and Analysis:** The service will encompass extensive observations and a comprehensive evaluation of prevailing conditions, specific noise sources, noise characteristics, existing controls (including personal protective equipment), and the identification of potential additional controls for noise reduction (if required).
 - 3.1.4. Reporting and Documentation:**
 - 3.1.4.1.** Information collected during the survey shall be incorporated into detailed noise zone drawings for each area. These drawings will clearly indicate specific noise sources, permanent worker positions (where applicable), relevant openings, measurement positions, the average noise rating level per area, and required demarcation.
 - 3.1.4.2.** The noise zone drawings will be supplemented by a formal, detailed report containing discussions, comments, and recommendations. This report will provide a complete and comprehensive evaluation of each surveyed area.

4. HAZARDOUS CHEMICAL MONITORING SURVEY

- 4.1.** The survey shall be carried out in terms of the Hazardous Chemical Agent (HCAs) regulations. The survey shall cover:
- 4.1.1. Chemical Risk Assessment:** Identify HCAs (reagents, solvents, waste), assess exposure scenarios (routine tasks, non-routine tasks, spills), evaluate existing controls (local ventilation performance, PPE, SOPs), and determine exposure routes and health effects.

- 4.1.2. **Personal Exposure Chemical Monitoring:** Conduct routine personal air sampling, focusing on high-risk tasks/employees. Simultaneously check local ventilation performance.
- 4.1.3. **Comparing Chemical Monitoring Exposure Results to Legislation:** Compare personal Time-Weighted Average (TWA) results against relevant local or international Occupational Exposure Limits to identify exceedances or approaching limits.
- 4.1.4. **Making Recommendations:** Provide specific, actionable recommendations based on the Hierarchy of Control to minimise exposure.

5. INDOOR AIR QUALITY (IAQ) & VENTILATION SURVEY

- 5.1. The assessment will evaluate the efficacy of office ventilation by measuring the following IAQ parameters within the occupied office areas on site, in compliance with the requirements of the Physical Agents Regulations (2024):
 - 5.1.1. Carbon monoxide (CO) gas concentrations.
 - 5.1.2. Carbon dioxide (CO₂) gas concentrations.
 - 5.1.3. Relative Humidity.
 - 5.1.4. Dry Bulb Temperatures.
- 5.2. A calibrated, direct-reading IAQ Monitor must be used to measure the required parameters.
- 5.3. The results obtained shall be compared against the Table 3: Guideline levels for indoor air quality parameters stipulated in the Physical Agents Regulations (2024).

6. FACILITIES HYGIENE SURVEY

- 6.1. Swab samples shall be collected from 10 selected surfaces within the kitchen and dining areas to assess the extent of contamination by potentially pathogenic micro-organisms. This assessment will inform comments regarding worker personal hygiene standards and the effectiveness of current cleaning regimens.
- 6.2. **The methodology shall include** swab sampling will be performed in accordance with SANS 18593:2004 (Horizontal methods for sampling techniques from surfaces using swabs). The swabs will be submitted to a SANAS accredited microbiology laboratory for Total Microbial Activity and

Escherichia coli analysis, using validated and standardised methodologies.

7. WHOLE BODY VIBRATION SURVEY

- 7.1.** Whole-Body Vibration exposure measurements will be performed on tasks where there is exposure to vibration as an occupational stressor, i.e. forklift operators.
- 7.2.** The methodology shall include vibration exposure measurements that shall be performed according to **SANS 2631 (or ISO 2631 series)** for whole-body vibration.
- 7.3.** The assessment shall use a calibrated Vibration Monitor/Accelerometer.
- 7.4.** Reference will be made to South African exposure limits (Physical Agents Regulations, 2024) and/or any other relevant standards prescribed, i.e. the European Directive 2002/44/EC.

8. ERGONOMIC ASSESSMENT

- 8.1.** An assessment of the site's ergonomics risk shall be conducted within the administrative and operational areas, in compliance with the Ergonomics Regulations.
- 8.2.** The assessment shall employ a probability versus severity methodology for identifying ergonomic hazards and determining the associated risk, based on the likelihood of exposure and the potential severity of the resulting consequences.
- 8.3.** The scope of the assessment will encompass office-based activities (specifically, computer workstation use), repetitive tasks such as the operation of laboratory equipment, and manual handling duties performed within operational areas.
- 8.4.** The assessment shall be performed using a combination of established Ergonomic Hazard and Risk Checklists/Scorecards (tools), such as the Ergonomic Risk Factor (ERF) Checklist adapted from Manitoba's Ergonomics Guideline and/or Ergonomics Guidelines derived from reputable standards.

9. HEALTH RISK ASSESSMENT (HRA)

An Occupational Health Risk Assessment (HRA) will be completed using a systematic probability-versus-severity methodology to identify, evaluate, and prioritize Occupational Hygiene risks. The HRA must incorporate the following:

- 9.1. **Occupation/Task-based Approach:** Employees will be grouped into Similarly Exposed Groups (SEGs) (laboratory workers, drivers, forklift operators, field workers, personnel working at sea, and office workers) to facilitate control implementation.
- 9.2. **Risk Assessment Methodology:** Use a systematic probability-versus-severity-versus frequency approach to identify Occupational Hazards, assess hazard exposures, and determine risk across all related processes and employee activities.
- 9.3. A comprehensive HRA shall be developed for the SEGs and determine:
 - 9.3.1. Worker exposure to various risk factors detected in the above surveys.
 - 9.3.2. Additionally, hazardous chemical risks associated with any pest control operations, worker exposure risk to heat/cold stress conditions, worker exposure to non-ionising radiation, and worker exposure risk to hazardous biological agents present in the working areas.
- 9.4. Risk assessment findings must rate risks by severity and priority.
- 9.5. Risk assessments shall identify potential differing physical agent exposure for men, women, young, and vulnerable employees where applicable.
- 9.6. Evaluate and comment on the suitability and adequacy of existing hazard exposure control measures.
- 9.7. Recommendations for controlling identified occupational hygiene risks shall typically cover:
 - 9.7.1. Medical Surveillance: Recommendation for a formal Medical Surveillance program, detailing the type and frequency of medical examinations (e.g., audiometry, lung function testing, biological monitoring) required where significant residual risks remain.
 - 9.7.2. Training: Recommendations for specific Occupational Health and Safety Training pertinent to the identified risks and control measures (e.g., safe work procedures, HCA handling, proper use and maintenance of PPE).
 - 9.7.3. Monitoring: Recommendation for further Occupational Hygiene Monitoring (e.g., personal or environmental sampling) to confirm the effectiveness of implemented controls or to better quantify an exposure risk.

10. LOCALITIES OF THE SITE

10.1. The surveys will be conducted at the SAEON Elwandle Node. The assessments shall be carried out at all major buildings on site. These include:

- 10.1.1. A-Block - administrative section with one shared kitchen
- 10.1.2. E-Block - offices and laboratories
- 10.1.3. E-Block extension - laboratories
- 10.1.4. E-block extension post graduate lab - open plan lab with offices at the end of each bench
- 10.1.5. H- block - workshop area - field trip preparation
- 10.1.6. E and H block has one shared kitchen
- 10.1.7. Boat shed - vessel storage (this includes some fuel storage).

11. REPORTS

11.1. Upon completion of the surveys/assessments, comprehensive reports shall be submitted, which must contain the following elements:

- 11.1.1. Legal References
 - 11.1.2. Methodology used
 - 11.1.3. References to statutory requirements and relevant Occupational Exposure Limits.
 - 11.1.4. Descriptions of exposure hazards.
 - 11.1.5. Tabulated results per individual and/or area.
 - 11.1.6. Description of employee tasks and exposure/source conditions.
 - 11.1.7. Evaluation of existing exposure control measures.
 - 11.1.8. Discussion and interpretation of results.
 - 11.1.9. Conclusions regarding risk.
 - 11.1.10. Recommendations for exposure control/improvements and management measures (including administrative, engineering, and Personal Protective Equipment (PPE) controls, medical surveillance requirements, and training needs).
- 11.2. The reports shall be delivered (electronically) within 8 weeks from the completed date of the site visits.
- 11.3. The Approved Inspection Authority will be required to engage in discussions with the SAEON SHER Coordinator and SAEON Elwandle Node Management where clarification of the results is deemed necessary.

12. GENERAL REQUIREMENTS AND SERVICES

The following requirements are mandatory for this service:

- 12.1. Qualified Personnel:** All personnel must be an Approved Inspection Authority, with verifiable qualifications traceable to the Department of Employment and Labour and the Southern African Institute of Occupational Hygiene.
- 12.2. Experience and Portfolio of Work:** Submission of a Portfolio of Works demonstrating experience in similar Occupational Hygiene Surveys over the last five years. This portfolio must specify the value, duration, and scope of each contract.
- 12.3. Staff Qualifications and Registration:** Submission of Curriculum Vitae (CV) for all suitably qualified staff who will execute the works. The CV must confirm their qualifications, experience, relevant training, and professional registration.
- 12.4. Client References:** Provide three (3) reference letters from clients (on company letter head) for whom similar work was conducted.

SETS OF QUOTATION DOCUMENTS REQUIRED

Number of ORIGINAL bid documents for contract signing 1

Bidders must submit the above number of original documents in electronic format (email) to the NRF. These serve as the original sets for the legal bid document and upon award, signature and serve as the legal contract document between the bidder and the NRF.

RETURNABLE DOCUMENTS CHECKLIST

The bidder is to complete this table and to supply the necessary page references to the supporting documentation. **A bidder failing to adequately provide any of the mandatory documents will be disqualified.**

Legislative/Technical Documents

Compliance

**(M – Mandatory); (O – Optional);
(A- Administrative)**

Submitted

**Bid Section
Reference**

**Reference to
Bidder's
document**

Bidder Eligibility

Procurement Invitation (SBD 1), signed and completed including the SBD 4, 6.1 and signed Bid Submission Certificate form.

A

☐ Yes
☐ No

Pages 1-20

Proof of authority must be submitted e.g. company resolution

A

☐ Yes
☐ No

Page 7

Proof of Registration on the Government's Central Supplier Database (CSD).

A

☐ Yes
☐ No

Page 5

A valid B-BBEE certificate or Sworn Affidavit

O

☐ Yes
☐ No

Pages 16-19

(M – Mandatory); (O – Optional); (A- Administrative)	Submitted		Bid Section Reference	Reference to Bidder's document
Specification Eligibility				
Qualified Personnel: All personnel must be an Approved Inspection Authority, with verifiable qualifications traceable to the Department of Employment and Labour and the Southern African Institute of Occupational Hygiene.	M	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 9 - 14	
Experience and Portfolio of Work: Submission of a Portfolio of Works demonstrating experience in similar Occupational Hygiene Surveys over the last five years. This portfolio must specify the value, duration, and scope of each contract.	M	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 9 - 14	
Staff Qualifications and Registration: Submission of Curriculum Vitae (CV) for all suitably qualified staff who will execute the works. The CV must confirm their qualifications, experience, relevant training, and professional registration.	M	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 9 - 14	
Client References: Provide three (3) reference letters from clients (on company letter head) for whom similar work was conducted.	M	<input type="checkbox"/> Yes <input type="checkbox"/> No	Page 9 - 14	
Pricing Documents	Compliance			
Pricing (SBD 3.2) in this document to be completed.	M	<input type="checkbox"/> Yes <input type="checkbox"/> No	Pages 09-11	

ELIGIBILITY CRITERIA (GO/NO-GO)

Selection Element		Meet Specification Minimum	Bid Section Reference	Reference Bidder's document to
1	Fully completed Procurement Invitation (SBD 1) including the SBD 4, 6.1 and signed Bid Submission Certificate form.	<input type="checkbox"/> YES <input type="checkbox"/> NO	Pages 1-20	
2	Fully completed pricing schedule (SBD 3.2)	<input type="checkbox"/> YES <input type="checkbox"/> NO	Documents' Due diligence Returnable of Eligibility on page	
3	Detailed specifications provided on the quotation have met the scope of work required.	<input type="checkbox"/> YES <input type="checkbox"/> NO	Detailed Specifications.	

SBD 3.2: PRICING DETAIL

Pricing Special Conditions

1	Pricing Schedule: In terms of <u>General Conditions of contract clause 17.1</u> , the price schedule remains unchanged for the duration of the contract with the NRF accepting no changes, extensions, or additional ad hoc costs to the pricing conditions of the contract with the exception of any price adjustments authorised in the Special Conditions of Contract for pricing set out below:
2	Firm Quantities over the Contract Period: The NRF requires firm set quantities during the current period with the time of delivery being determined during the contract period.
3	Estimated quantities over the Contract Period: The NRF may require further quantities during the current period with the actual quantity and time of delivery being determined when such quantities are needed. For bidding purposes and to establish the contract ceiling price, the NRF provides estimated quantities of what its requirements and estimated timing during the contract period for bidders to establish their pricing. The NRF does not provide guarantees or commitments that it will order this entire amount during the contract's life. The NRF, through the signed contract, guarantees its procurement of the specified goods and/or services is from the contracted party only.
4	Placement of written purchase orders for actual quantities ordered: The NRF manages the execution of this contract through the issue of written purchase orders – stipulating quantity, description, delivery date, and the unit price as set out in this contract - for the contracted supplies. The NRF, when issuing the written purchase order, guarantees that the funding is available.
5	Contract Ceiling Price: With these estimates in the bid contract, the contract ceiling price includes both the firm quantities and the potential future quantities within the contract ceiling price. The NRF manages the contract within the contract ceiling price by paying only for the verified deliveries/performances in terms of the clauses of this contract. The cumulative value of each of these invoices at the expiry of the contract is the actual total contract price.
6	Price Adjustments: In terms of <u>General Conditions of Contract clause 17.1</u> , the price

SBD 3.2: PRICING DETAIL	
	<p>adjustments with the rules for application are set out below as special conditions of <u>Contract Clause 17.1.</u></p> <p><u>Price adjustments and their corresponding rules are for the management of price risks on the basis of the NRF and the contracted bidder sharing the risk equally.</u></p>
7	<u>Price quoted</u> is South African Rands in terms of General Conditions of contract clause 16.4
8	<p><u>Price Quotation Basis</u> Price quoted is fully inclusive of all costs including delivery to the specified NRF price delivery point and includes value- added tax, income tax, unemployment insurance fund contributions, and skills development levies in terms of General Conditions of contract clauses 12, 32.1 and 32.2.</p> <p><u>Price Delivery Point:</u> In cases where different delivery points influence the pricing, the bidder submits a separate pricing schedule for each delivery point.</p>
9	<u>Detail Pricing Support:</u> Detailed information e.g. costed bill of quantities is optional where not stated in the price schedule below and is provided as an annexure to the details included in this SBD 3
10	<u>Application of Preference Points:</u> Pricing is subject to the addition of Preference Points as stipulated below - Standard Bidding Document 6.1 Preference claim form.

<u>PRICING SCHEDULE 3.2</u>

DESCRIPTION (Refer to specification)		QTY	UNIT OF MEASURE	TOTAL PRICE
1.	Illumination Survey	1		
2.	Noise Zoning and Monitoring Survey	1		
3.	Chemical Monitoring Survey	1		
4.	Ventilation Survey	1		
5.	Facilities Hygiene Survey	1		
6	Ergonomics Assessment	1		
7	Indoor Air Quality Assessment	1		
8	Health Risk Assessment Review	1		
TOTAL PRICE EXCLUDING VAT				R
VAT				R

DESCRIPTION (Refer to specification)	QTY	UNIT OF MEASURE	TOTAL PRICE
TOTAL CONTRACT INCLUDING VAT (CEILING PRICE)			R

GENERAL CONDITIONS OF CONTRACT

The National Research Foundation cannot amend the National Treasury's General Conditions of Contract (GCC). The National Research Foundation therefore appends Special Conditions of Contract (SCC) providing specific information relevant to a GCC clause to its the National Treasury's General Conditions of Contract. Special Conditions specific to this bid contract are set out in this document.

The NRF deems the bidders to have accessed and read the General Conditions of Contract. Whenever there is an unintended conflict, the provisions of the Special Conditions of Contract shall prevail over the General Conditions of Contract.

SPECIAL CONDITIONS OF CONTRACT

(AMENDMENTS TO SPECIFIC CLAUSES OF THE GENERAL CONDITIONS OF CONTRACT LISTED BELOW EACH CLAUSE IN THAT SECTION).

1 Service Provider Obligations:

The service provider must exercise reasonable skill, care and diligence in rendering all services included in this procurement contract.

The service provider must deliver the services during normal working hours (i.e. Monday to Friday, excluding public holidays from 08h30 to 17h00) and/or such additional hours as may be reasonably required by the NRF due to the existence of special circumstances. Services rendered outside of these hours will only be rendered by mutual agreement with the nominated person of the NRF, based on severity level.

The service provider may not do anything that may prejudice or be adverse to the operations and functions of the NRF

The service provider must submit such information and reports, as specified in the agreed service request, to the person nominated by the NRF, and comply with all legislation applicable in providing these services.

The service provider corresponds and delivers services only to the NRF and end users of the NRF.

2 Communication: The contracted parties communicate in writing through mail, delivery, or email. The contracted party states the contract number and purchase order number, if the latter is applicable, on communication documentation. The contract party does not act upon any communication without the contract number or must verify such communication with the assigned NRF contract manager prior to acting upon it.

3 Occupational Health and Safety when working on NRF sites: All personnel performing work on NRF site/s as part of this contract are responsible to obtain safety induction.

Over and above the obligations provided by the Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations, known as 'the Act'), the contracted party meets with all relevant health and safety instructions as given to them by site safety personnel, where relevant. Personal protection equipment including closed safety shoes, hard hats, height safety equipment, and high visibility vests are worn at all times while on the work

SPECIAL CONDITIONS OF CONTRACT

site. All personnel are to obey the relevant instructions, including signage, related to restricted access and speed limits on all sites.

The contracted party, once signing the contract (SBD 7), is responsible for itself, its employees, and those people affected by its operations in terms of the Act the regulations promulgated in terms thereof. The contracted party performs all work and uses equipment on site complying with the provisions of the Act.

To this end, the contracted party shall make available to the NRF the valid Letter of Good Standing in terms of the COID Act and ensure its validity does not expire while executing this bid, where applicable. The contracted party furnishes its registration number with the office of the Compensation Commissioner. The contracted party enters into a Section 37.2 agreement in terms of Occupational Health and Safety Act (OHS Act No 85 of 1993 and its Regulations) that the NRF drafts.

The contracted party maintains a health and safety plan complying with the requirements of The Act at the work site during the period that contracted work takes place on the site.

The NRF manages the contracted party in his capacity for the execution of this contract to meet the provisions of the said Act and the regulations promulgated in terms thereof. The contracted party accepts liability for any contraventions to the Act. Each member of the contracted party's team (including sub-contracted personnel), submit a signed indemnity form prior to entering the work site and kept in the contracted party's health and safety file.

MANAGEMENT OF PERFORMANCE LEVELS

The Performance Levels are in the table below.

1. The NRF measures the contracted bidder's performance against these performance levels in the execution of the contract.
2. The contracted bidder recognises that its failure to meet the performance levels has a material and adverse impact on the operations of NRF and that the damages from the contracted bidder's failure to meet any performance level is not susceptible to precise determination.
3. The NRF excuses the contracted bidder from failing to comply with the performance levels to the extent that non-performance or delayed performance is solely and directly attributable to an act or omission of the NRF or its staff or circumstances of force majeure as referred to in this Agreement.
4. If the contracted bidder fails to meet any performance level:
 1. the contracted bidder shall investigate and report on the root causes of the performance level failure;
 - promptly correct the failure and begin meeting the set performance levels;
 2. advise the NRF as and to the extent requested by the NRF of the status of remedial efforts being undertaken with respect to such performance level failure; and
 3. take appropriate preventative measures to prevent the recurrence of the performance level failure.
5. Both parties are responsible for monitoring and measuring the performance of the contracted bidder against the performance levels set in this document. The NRF deems failure by the contracted bidder to measure performance with respect to the contract specifications for any measurement period, as a failure to meet the stipulated performance levels.

MANAGEMENT OF PERFORMANCE LEVELS
PERFORMANCE LEVELS STATEMENT

Service/Goods being Measured	Measurement Methodology	Penalty/Bonus and level applicable from
Appointment of a service provider to provide a health risk assessment and occupational hygiene surveys, in terms of various regulations within the occupational health and safety act, 1993 (act 85 of 1993).	Check the completeness of the delivery against the Purchase order.	No completion certificate or invoice will be approved and paid if the delivery is not satisfactory.

SBD 4 BIDDER'S DISCLOSURE
<p>1. PURPOSE OF THE FORM</p> <p>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.</p> <p>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.</p> <p>2. Bidder's declaration</p> <p>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</p> <p>2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state</p>

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.

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;

PREFERENCE POINTS CLAIMED (SBD 6.1)

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 Preference point system

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

a) The **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 Allocated preference points

The maximum points for this tender are allocated as follows:

The maximum points for this tender are allocated as follows:

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

- a. 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.
- b. 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.

PREFERENCE POINTS CLAIMED (SBD 6.1)

4. 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 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

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

PREFERENCE POINTS CLAIMED (SBD 6.1)

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

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.) Tenderer to submit a valid BBBEE certificate in order to earn points on specific goals. Failure to submit a valid BBBEE certificate, the bidder will not be allocated points for specific goals.

The BBBEE allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
1	20	
2	18	
3	14	
4	12	
5	8	
6	6	
7	4	
8	2	
Non-compliant	0	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.2 Name of company/firm.....

4.3 Company registration number:

4.4 TYPE OF COMPANY/ FIRM

- Partnership/Joint Venture / Consortium
- One-person business/sole propriety
- Close corporation
- Public Company
- Personal Liability Company

PREFERENCE POINTS CLAIMED (SBD 6.1)

- (Pty) Limited
- Non-Profit Company
- State Owned Company

[TICK APPLICABLE BOX]

4.5 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:

- The information furnished is true and correct;
- The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- 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;
- 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:

.....

.....

PREFERENCE POINTS CLAIMED (SBD 6.1)
.....

BID SUBMISSION CERTIFICATE FORM - (SBD 1)	
I hereby undertake to supply all or any of the goods, works, and services described in this procurement invitation to the NRF in accordance with the requirements and specifications stipulated in this Bid Invitation document at the price/s quoted.	
My offer remains binding upon me and open for acceptance by the NRF during the validity period indicated and calculated from the closing time of Bid Invitation.	
The following documents are deemed to form and be read and construed as part of this offer / bid even where integrated in this document:	
Invitation to Bid (SBD 1)	Specification(s) set out in this Quotation Invitation inclusive of any annexures thereto
Bidder's responses to this invitation as attached to this document	Pricing Schedule(s) (SBD3) including detailed schedules attached
Local Content and Local Manufacturing Certification (SBD 6.2) in accordance with the SABS standard	
Declaration of Interest (SBD4)	General Conditions of Contract and special/additional conditions of contract as set out in this document
Preference (SBD 6.1) claims for Broad Based Black Economic Empowerment Status Level of Contribution, supported by a valid certified BBBEE certificate.	

I confirm that I have satisfied myself as to the correctness and validity of my offer / bid in response to this Bid Invitation; that the price(s) and rate(s) quoted cover all the goods, works and services specified in the Bid Invitation and cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me in terms of this Bid Invitation as the principal liable for the due fulfilment of the subsequent contract if awarded to me.
I declare that I have had no participation in any collusive practices with any Bidder or any other person

regarding this or any other Bid.	
I certify that the information furnished in these declarations (SBD 3, SBD 4, SBD 6.1 and SBD 6.2 (if applicable)) is correct and I accept that the NRF may reject the Bid or act against me should these declarations prove to be false.	
I confirm that I am duly authorised to sign this offer/ bid response.	
NAME (PRINT)	
CAPACITY	
SIGNATURE	
WITNESS 1	
NAME	
SIGNATURE	
WITNESS 2	
NAME	
SIGNATURE	
DATE	