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:00100225245

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. BACKGROUND

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' 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 19 October 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. NON-COMPULSARY BRIEFING SESSION

7.1 Prospective supplier(s) that wish to attend the briefing session must email their Microsoft Teams credential to: scm@mrc.ac.za prior to the meeting.

8. CLOSING DATE FOR SUBMISSIONS

8.1. The closing date for submissions is **11:00 (SAST) on 22 October 2026**

9. 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		

10. RETURNABLE DOCUMENTS FOR ELIGIBILITY ASSESSMENT

10.1. Registration with the Central Supply Database (CSD) of the South African government

10.2. Valid tax clearance or PIN

10.3. Company registration documents

10.4. BBBEE status

10.5. Certified Copy of Broad Based Black Economic Empowerment (B-BBEE) certificate issued by SANAS accredited Agency

10.6. Completed SBD documents (Attached)

10.7. Certificate of Authority for Joint Ventures (where applicable)

10.8. Letter of Good Standing with the Compensation Fund of DoEL

10.9. Required information as per table 1 for evaluation purposes

10.10. Certified Copy of Public-Environmental Liability Insurance

11. EVALUATION CRITERIA

11.1. 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.

11.2. 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.

12. 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**.**

FRANCIE VAN ZIJL DRIVE
PAROWVALLEY
TYGERBERG
7505
Telephone: 0219380911
Email: scm@mrc.ac.za

REQUEST FOR PROPOSAL
SBD 1 (Part A)

ACQUISITION NUMBER:	00100225245OR
DESCRIPTION OF ACQUISITION:	COIDA Administrative
ACQUISITION ISSUE DATE:	07 Oct 2026
CLOSING DATE AND TIME:	22 Oct 2026 11:00

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:	
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE	[TICK APPLICABLE BOX] ☐ YES ☐ NO		B-BBEE STATUS LEVEL SWORN AFFIDAVIT	[TICK APPLICABLE BOX] ☐ YES ☐ 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?	☐ YES ☐ NO [IF YES ENCLOSE PROOF]		***ARE YOU A FOREIGN BASED SUPPLIER FOR** THE GOODS /SERVICES /WORKS 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.

Date Generated: Oct 8 2026 1:32PM

TERMS AND CONDITIONS FOR PROPOSAL
SBD 1 (Part B)

1.	PROPOSAL SUBMISSION:
1.1	VENDORS MUST SUPPLY WRITTEN PROPOSALS THAT REFLECT THE FOLLOWING INFORMATION: PRICE VALIDITY PERIOD WHICH IS THE PERIOD THAT YOUR PRICE IS VALID FROM THE DATE OF PROPOSAL), ALL INCLUSIVE PRICES ARE REQUIRED PER ITEM, DELIVERY LEAD TIME, COMPANY NAME, COMPANY REGISTRATION NUMBER, VAT REGISTRATION NUMBER (IF REGISTERED), ADDRESS, CONTACT PERSON, TELEPHONE NUMBER, EMAIL ADDRESS.
1.2	VENDORS MUST RETURN A SIGNED BIDDER`S DISCLOSURE ATTACHED TO THIS DOCUMENT TOGETHER WITH THEIR PROPOSAL.
1.3	ALL PRICES MUST BE FIXED AND FIRM, AND WILL BE ROUNDED UP TO TWO DECIMAL PLACES.
1.4	PROPOSALS OVER R1000000 (INCLUSIVE OF VAT) WILL NOT BE ACCEPTED, REGARDLESS OF VAT REGISTRATION.
1.5	ALL PROPOSALS MUST BE VALID FOR 90 DAYS FROM THE CLOSING DATE.
1.6	DELIVERY WILL BE MADE DIRECTLY TO THE DELIVERY ADDRESS ABOVE.
1.7	VENDORS THAT ARE NOT VAT REGISTERED SHOULD SHOW PRICES EXCLUSIVE OF VAT. IF YOU HAVE SUBSEQUENTLY REGISTERED FOR VAT, YOUR PROPOSAL WILL NOT BE ACCEPTED AND YOU ARE REQUIRED TO SUBMIT YOUR UPDATED VAT DETAILS.
1.8	VENDORS THAT ARE VAT REGISTERED SHOULD SHOW UNIT PRICES PER ITEM EXCLUSIVE OF VAT AND THE TOTAL AMOUNT FOR THE PROPOSAL MUST BE SHOWN INCLUSIVE AND EXCLUSIVE OF VAT.
1.9	ALL PURCHASES WILL BE MADE THROUGH AN OFFICIAL ORDER FORM. THEREFORE NO GOODS MUST BE DELIVERED AND /OR SERVICES RENDERED BEFORE AN OFFICIAL ORDER HAS BEEN RECEIVED.
1.10	SAMRC IS NOT COMPELLED TO ACCEPT THE LOWEST OR ALTERNATIVE PROPOSALS/BID; RESERVES THE RIGHT TO ACCEPT PART OR WHOLE OF ANY PROPOSAL/BID OR TO CANCEL THE PROPOSAL/BID AS WELL AS TO ACCEPT MULTIPLE BIDS FOR THE SAME PRODUCT.
1.11	THE SUPPLIER SHALL BE DEEMED TO HAVE SATISFIED HIM/HERSELF BEFORE QUOTING AS TO THE CORRECTNESS AND SUFFICIENCY OF HIS/HER PRICE FOR THE WORKS AND PRICES HE/SHE HAS STATED IN THE SCHEDULES/PROPOSAL WHICH RATES AND PRICES SHALL COVER ALL HIS/HER OBLIGATIONS UNDER THE CONTRACT/RFQ AND ALL MATTERS AND THINGS NECESSARY FOR THE PROPER COMPLETION OF THE WORKS.
1.12	SAMRC's PAYMENT TERMS ARE 30 DAYS FROM DATE OF STATEMENT - SAMRC DOES NOT ALLOW ANY FORM OF PRE-PAYMENT TERMS FOR ORDERS PLACED OTHER THAN THE 30 DAYS FROM STATEMENT.
1.13	IN APPLYING THE PRINCIPLES OF THE PUBLIC SERVICES ACT, 1994, AND ITS REGULATIONS THE SAMRC WILL NOT PROCURE WORK/GOODS/SERVICES FROM EMPLOYEES OF THE STATE IN THEIR CAPACITY AS INDIVIDUALS OR THROUGH SUPPLIERS/CONTRACTORS IN WHICH AN EMPLOYEE OF THE STATE HOLDS A FINANCIAL INTEREST.
1.14	A B-BBEE CERTIFICATE OR AFFIDAVIT MUST BE SUBMITTED WITH PROPOSALS TO BE ELIGIBLE TO CLAIM PREFERENTIAL POINTS (80/20).
1.15	A MINIMUM OF CIDB GRADING 1 OR 2 FOR ALL CLASSES OF CONSTRUCTION WORKS WILL BE CONSIDERED IN TERMS OF YOUR PROPOSAL SUBMISSION AND SAMRC WILL REJECT PROPOSALS RECEIVED FROM CONSTRUCTORS THAT ARE NOT REGISTERED ON CIDB PLUS CONSTRUCTORS THAT DO NOT HAVE ACTIVE STATUS ON CIDB.
1.16	NOTE THAT THE RATES OF EXCHANGE QUOTED BY THE BIDDER(S) IN THE DECLARATION CERTIFICATE WILL BE VERIFIED.
1.17	VENDORS TO STATE THE ACQUISITION NUMBER WHEN SUBMITTING A PROPOSAL VIA SCM@MRC.AC.ZA
1.18	THE NON-DELIVERY OF GOODS AND SERVICES AT THE PURCHASE ORDER STAGE WILL RESULT IN FLAGGING THE COMPANY IN TERMS OF PERFORMANCE AND FURTHERMORE WILL RESULT IN THE COMPANY BEING REPORTED TO NATIONAL TREASURY.
1.19	IF THE BIDDER WITHDRAWS HIS/HER PROPOSAL AT THE TIME OF PURCHASE ORDER SUBMISSION, OR FAIL TO FULFIL THE CONTRACT WHEN CALLED UPON TO DO SO, THE SAMRC MAY, WITHOUT PREJUDICE TO ITS OTHER RIGHTS, AGREE TO THE WITHDRAWAL OF THE TENDER OR CANCEL THE CONTRACT/PURCHASE ORDER THAT MAY HAVE BEEN ENTERED INTO BETWEEN THE BIDDER AND THE SAMRC. THE BIDDER SHALL THEN PAY TO THE SAMRC ANY ADDITIONAL EXPENSE INCURRED BY THE SAMRC HAVING EITHER TO ACCEPT ANY LESS FAVOURABLE BID OR, IF NEW PROPOSALS HAVE TO BE INVITED, THE ADDITIONAL EXPENDITURE INCURRED BY THE INVITATION OF NEW BIDDERS AND BY THE SUBSEQUENT ACCEPTANCE OF ANY LESS FAVOURABLE BID. THE SAMRC SHALL ALSO HAVE THE RIGHT TO RECOVER SUCH ADDITIONAL EXPENDITURE BY SETTING IT OFF AGAINST MONEYS WHICH MAY BE DUE OR BECOME DUE TO THE BIDDER UNDER THIS OR ANY OTHER TENDER OR CONTRACT OR AGAINST ANY (PERFORMANCE) GUARANTEE OR DEPOSIT THAT MAY HAVE BEEN FURNISHED BY THE BIDDER OR ON ITS BEHALF FOR THE DUE FULFILMENT OF THIS OR ANY OTHER BID OR CONTRACT AND PENDING THE ASCERTAINMENT OF THE AMOUNT OF SUCH ADDITIONAL EXPENDITURE TO RETAIN SUCH MONEYS, GUARANTEE OR DEPOSIT AS SECURITY FOR ANY LOSS THE SAMRC MAY SUSTAIN BY REASON OF THE BIDDER's DEFAULT.
1.20	LATE AND INCOMPLETE SUBMISSIONS SHALL NOT BE ACCEPTED.
1.21	BIDDERS WHO CONSISTENTLY DO NOT RESPOND TO ACQUISITION INVITATIONS, MAY BE EXCLUDED FROM INVITATIONS TO FUTURE ACQUISITIONS.
1.22	ANY BIDDER WHO HAS REASON TO BELIEVE THAT THE RFQ SPECIFICATION IS BASED ON A SPECIFIC BRAND MUST INFORM THE SAMRC BEFORE THE RFQ's CLOSING DATE.
1.23	IF YOU ARE A SUCCESSFUL BIDDER FOR THIS RFQ, YOU WILL BE REQUIRED TO PRODUCE PROOF OF GOODS DELIVERY BY MEANS OF A SIGNED DELIVERY NOTE OR JOB CARD AS PART OF SUBMISSION OF YOUR INVOICE(S) FOR PAYMENT.
1.24	VENDORS MUST ENSURE THAT ALL PAGES ARE INITIALLED
2.	**TAX COMPLIANCE REQUIREMENTS**
2.1	BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2	IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE CSD NUMBER.
2.3	THE BIDDER MUST BE REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD). THE BIDDER`S TAX COMPLIANCE STATUS WILL BE CHECKED ON THE CSD AT THE TIME OF AWARD.
2.4	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 IN THE SERVICE OF THE STATE, UNLESS THE BIDDER PROVIDES THE PROOF OF AUTHORITY TO UNDERTAKE REMUNERATIVE WORK OUTSIDE EMPLOYMENT IN THE PUBLIC SECTOR.

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:

BID NOTICE AND INVITATION TO BID

You are hereby invited to bid for the following Request for Bid
00100225245OR
COIDA Administrative

ACQUISITION NUMBER:	00100225245OR
DESCRIPTION OF ACQUISITION:	COIDA Administrative
ACQUISITION ISSUE DATE:	07 Oct 2026
CLOSING DATE AND TIME:	22 Oct 2026 11:00
ACQUISITION VALIDITY PERIOD:	90 days (FROM THE BID CLOSING DATE)
DELIVERY ADDRESS:	, , ,

Please submit a quotation for the items listed below. Only quotations which contain the information requested below will be considered. Please read the instructions below before completing your quotation.

Item Number	Description	Vatable	Unit of Measure	Quantity
10593	COID Link Risk Services	YES	EA	1

BRIEFING SESSION DATE:	15 Oct 2026 11h00
COMPULSORY (Yes / No):	NO
IN PERSON / VIRTUAL / HYBRID:	VIRTUAL
VIRTUAL MEETING LINK:	https://teams.microsoft.com/meet/396995726751280?p=cvUwaeGEfNDUWYxpxD

CLARIFICATION QUESTIONS:	Submit clarification questions through the SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL. (see details below on how to access the Supplier Portal)
DEADLINE FOR CLARIFICATION QUESTIONS:	16 Oct 2026 23:59

ENQUIRIES:	Supply Chain Management Department Tel no: 0219380396 Email: scm@mrc.ac.za
BIDDING DOCUMENTS AVAILABLE AT:	SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL. Under the following Bid Number 00100225245OR. (see details below on how to access the Supplier Portal)

INCLUDED IN THIS BID DOCUMENT:	• BIDDER'S ACCEPTANCE OF TERMS AND CONDITIONS OF BIDDING • BID NOTICE AND INVITATION TO BID • BID DATA • BIDDER'S DISCLOSURE • PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022 (SBD 6.1) • DETAILED TERMS OF REFERENCE • POPIA COMPLIANCE

INSTRUCTIONS FOR BRIEFING SESSION:	• Bidders are to ensure on time arrival at site/online meeting. Representative must be sufficiently qualified, to accurately relay and communicate briefing discussions. • Bidders must ensure that their CSD Supplier Number is available in order to register at the Briefing Session.

INSTRUCTIONS FOR PROPOSAL SUBMISSION:	Bids must be submitted online through the SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL (see details below on how to access the Supplier Portal OR BIDS MUST BE SUBMITTED ELECTRONICALLY/IN WRITING TO THE CONTACT PERSON BELOW BY **22 Oct 2026 11h00** AND MUST BE EMAILED TO **scm@mrc.ac.za**

HOW TO ACCESS THE SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL:	**Accessing the SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL** • Bidders can access the SUPPLIER PORTAL at the following link: - https://scmportal.samrc.ac.za **Signing up on the SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL** • Bidders must sign up on the SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL to access the Acquisition, submit clarification questions, register for a briefing session (if any) and submit a response to the Acquisition. • If you have not already signed up on the SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL, you can sign up by: 1. Access the SUPPLIER PORTAL and click on the "CREATE AN ACCOUNT" at the top right hand side of the page. 2. Enter your Central Supplier Database (CSD) Supplier Number, Unique Registration Reference Number (obtained from your CSD account) and an email address. Then click on the "CREATE AN ACCOUNT" button. 3. You will be redirected to register an account with the email address. 4. Agree to the Terms and Conditions and pay attention to the guided tutorial on how to use the Supplier Portal. **Accessing Acquisitions (RFx/Bids)** • Once signed in to the SOUTH AFRICAN MEDICAL RESEARCH COUNCIL SUPPLIER PORTAL, bidders can find the required Acquisition by clicking on Acquisitions in the main banner. Bidders can engage with the Acquisition and view all necessary information, including access to the Acquisition Documents. **Submitting Clarification Questions (If available)** • Bidders will thereafter be able to capture any clarification questions and view any responses to clarification questions. • Bidder can submit Clarification Questions after Briefing Session and Before Deadline for Clarification Questions. • Bidders will receive an email once their clarification questions have been answered. • Bidders can view and track all clarification questions submitted through the supplier portal. **Creating and Submitting Responses to Acquisitions** • Once signed in, bidders can find the required acquisition by clicking on Acquisitions on the main banner. Bidders can engage with the Acquisition and view necessary information, including Acquisition Documents. • Bidders will be able to capture their response to an Acquisition and upload their submission documents, no later than Acquisition Closing Date and Time. • Bidders are to ensure the documents being uploaded are correct, accurate and duly completed

Kindly confirm if you have complied with all the mandatory requirements:

Mandatory Requirements Questions	Bidders Response
Have you read, signed, and attached the terms and conditions of the RFP?	☐
Have you completed, signed and attached the Bidder`s Disclosure?	☐
Have you completed, signed and attached the SBD 6.1?	☐
Have you attached your B-BBEE certificate or affidavit (if applicable)?	☐
Have you attached your CIDB Certificate (if applicable)?	☐
Have you attached your COIDA Certificate or provide a letter if you don't have a COIDA certificate?	☐
Have you attached your signed POPIA COMPLIANCE consent?	☐

ACQUISITION INFORMATION

Please submit a bid for the items listed below. Only bids which contain the information requested below will be considered. Please read the instructions below before completing your bid.

Item Number	Description	Vatable	Unit of Measure	Quantity
10593	COID Link Risk Services	YES	EA	1

ELIGIBILITY CRITERIA

The following Eligibility Criteria have been set up: -

1. Bidders must be registered on National Treasury's Centralised Supplier Database - Bidders must submit Proof of Registration with National Treasury Central Supplier Database (CSD) - Provide CSD Summary Report
2. Bidder's must be Tax Compliant at time of Award
3. Bidders Acceptance of TERMS AND CONDITIONS OF BIDDING, duly signed
4. BIDDERS DISCLOSURE duly completed and signed
5. PREFERENCE POINTS CLAIM FORM (SBD 6.1) duly completed and signed
6. FORM OF OFFER duly completed and signed
7. GENERAL CONDITIONS OF CONTRACT duly completed and signed
8. Valid original or certified COIDA LETTER OF GOOD STANDING
9. Proof of authority from the ORIGINAL EQUIPMENT MANUFACTURER (OEM) to sell, distribute, and support the products of the OEM
10. Proof of authority from the ORIGINAL SOFTWARE MANUFACTURER (OSM) to sell, distribute, implement and support the products of the OSM
11. At least 3 written and contactable REFERENCES
12. A joint venture legal agreement in the event of a joint venture proposal
13. A valid BBBEE STATUS LEVEL VERIFICATION CERTIFICATE or a SWORN AFFIDAVIT

EVALUATION CRITERIA

EVALUATION TYPE: **PPR 2022 80-20 POINTS SYSTEM**
EVALUATION VERSION: **2**

Total Points Breakdown

DETAILS	POINTS
Price Points	80
Preference Points	20
2 STAGE BIDDING	
Total Points	**100**

Preference Points Breakdown

Black Shareholding

Range	POINTS
0	0
<= 50	5
> 50	10

Black Female Shareholding

Range	POINTS
0	0
<= 50	3.5
> 50	7

51% or More Black Owned EME

Range	POINTS
0	0
1	3

FUNCTIONALITY CRITERIA: -

Functionality Criteria	POINTS
Company profile and relevant experience Company profile, core business, 5 â€“ 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
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
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
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
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
TOTAL POINTS	**100**

BIDDER`S DISCLOSURE

1. **PURPOSE OF THE FORM**

1.1 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, 1996 (Constitution), and further expressed in the various applicable legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

1.2 If a person is 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. **DECLARATION ON EMPLOYMENT BY ORGAN OF STATE**

2.1 Is the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder employed by an organ of state, as defined in section 239 of the Constitution?

Yes	No

2.1.1 If YES, furnish particulars of the names, individual identity numbers, in the table below:

Full Name	**Identity Number**	**Name of organ of state**

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[1] 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, indicate all companies registered in the CSD in the table below:

Supplier registration number (MAAA)	**Status (active / inactive / deleted)**

Failure to disclose all CSD-registered active companies linked to all Directors will lead to disqualification.

[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.

_____
Initials

BIDDER`S DISCLOSURE (continued)

3. **GENERAL DECLARATION**

I, _____, the undersigned, in submitting the accompanying bid for **Acquisition #: 00100225245OR** to **SOUTH AFRICAN MEDICAL RESEARCH COUNCIL**, 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 to be false.

3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.

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, 1998 (Act No. 89 of 1998) and or may be referred to law enforcement agencies for criminal investigation and or may be restricted from conducting business with the state for a period not exceeding 10 years in terms of the Prevention and Combating of Corrupt Activities Act, 2004 (Act No. 12 of 2004) or any other applicable legislation.

I CERTIFY THAT THE ABOVE IS CORRECT. I ACCEPT THAT THE PROCURING INSTITUTION MAY REJECT THE BID OR TAKE APPROPRIATE ACTION AGAINST ME IF THIS DECLARATION IS FALSE.

_____ _____

Signature Date

_____ _____

Designation/Position Name of Bidder/Firm

PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022 (SBD 6.1)

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 all bids:

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

1.3 Points for this bid 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 bid are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
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 contractsâ€ 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

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where
Ps = Points scored for price of bid under consideration

Pt = Price of bid under consideration

Pmin = Price of lowest acceptable bid

3.2 FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME-GENERATING PROCUREMENT

3.2 1 POINTS AWARDED FOR PRICE

A maximum of 80 points is allocated for price on the following basis:
80/20

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right)$$

Where
Ps = Points scored for price of bid under consideration

Pmax = Price of highest acceptable bid

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:

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.

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

The specific goals 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)
Black Shareholding	10	
Black Female Shareholding	7	
51% or More Black Owned EME	3	

The following table(s) show the breakdown of points per specific goal.

Black Shareholding

Range	POINTS
0	0
<= 50	5
> 50	10

Black Female Shareholding

Range	POINTS
0	0
<= 50	3.5
> 50	7

51% or More Black Owned EME

Range	POINTS
0	0
1	3

4.2.1 SUB-CONTRACTING

4.2.1.1 Will any portion of the goods/services be sub-contracted? (Tick applicable box)

Yes	No

4.2.1.2 If yes, indicate:

i. What percentage of the contract will be subcontracted _____%

ii. The name of the sub-contractor _____

iii. _____

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3 Name of company/firm:

4.4 Company registration number:

4.5 TYPE OF COMPANY/FIRM:

4.6 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 bidding process;
b. recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
c. cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
d. recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury 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.

SIGNATURE OF BIDDER(S)

SURNAME AND NAME:

DATE

ADDRESS

DECLARATION FOR SPECIFIC GOALS

The specific goal ownership percentage indicated below will be used to calculate the total specified goals points based on the points allocated above:

An EME who is ALSO 51% or More Black Owned		
Indicate whether point(s) allocated for this goal is (are) claimed	Yes	No
Indicate whether your company is an EME and has more than 51% black owned	Yes	No
Please provide a valid BBBEE scorecard or sworn affidavit to verify the Exempted Micro Enterprise status and 51% or more of black ownership.		

Black Female Shareholding		
Indicate whether point(s) allocated for this goal is (are) claimed	Yes	No

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. In the event of a contract being awarded as a result of the ownership points claimed in this declaration, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
iii. 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 or terminate the contract in whole or in part,
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 OF BIDDER(S)

SURNAME AND NAME:

DATE

POPIA COMPLIANCE

CONSENT TO PROCESS PERSONAL INFORMATION IN TERMS OF THE PROTECTION OF PERSONAL INFORMATION ACT, 4 OF 2013 (POPIA), FOR STAKEHOLDERS EXTERNAL TO THE SAMRC

For use by:
THE SOUTH AFRICAN MEDICAL RESEARCH COUNCIL, including all its divisions **("SAMRC")**

1. INTRODUCTION
The Protection of Personal Information Act, 4 of 2013, (POPIA) governs how personal information must be processed by public and private bodies to ensure privacy and protect individuals' constitutional right to privacy.***In terms of the POPI Act, the South African Medical Research Council (SAMRC) has a legal duty to process a person's Personal Information in a lawful, legitimate, and responsible manner.***

The SAMRC does and will from time-to-time process Personal Information. In terms of POPIA all persons, including any SAMRC employee and/or partner who collects, manages, processes, transfers, stores and/or retains such Personal Information, whether held under a document, recording or in any other format, has a responsibility to process such information in accordance with the provisions under POPIA.

In order to discharge this duty; the SAMRC, as the responsible party, requires your express and informed permission to process your Personal Information for the purpose of evaluation of the bid.

2. DEFINITIONS
Take note of the following definitions which will be used throughout this document, and which are used in the POPIA
"biometrics" means a technique of personal identification that is based on physical, physiological, or behavioral characterization including blood typing, fingerprinting, DNA analysis, retinal scanning and voice recognition;

"child" means a natural person under the age of 18 years who is not legally competent, without the assistance of a competent person, to take any action or decision in respect of any matter concerning him-or herself;

"competent person" means any person who is legally competent to consent to any action or decision being taken in respect of any matter concerning a child;

"consent" means any voluntary, specific and informed expression of will in terms of which permission is given for the processing of Personal Information;

"data subject" means the person to whom Personal Information relates;

"operator" means a person who processes Personal Information for a responsible party in terms of a contract or mandate, without coming under the direct authority of that party;

"person" means a natural person or a juristic person;

"Personal Information" means information relating to an identifiable, living, natural person, and where it is applicable, an identifiable, existing juristic person, including, but not limited to:

a. information relating to the race, gender, sex, pregnancy, marital status, national, ethnic or social origin, colour, sexual orientation, age, physical or mental health, well-being, disability, religion, conscience, belief, culture, language and birth of the person;
b. information relating to the education or the medical, financial, criminal or employment history of the person;
c. any identifying number, symbol, e-mail address, physical address, telephone number, location information, online identifier, or other particular assignment to the person;
d. the biometric information of the person;
e. the personal opinions, views, or preferences of the person;
f. correspondence sent by the person that is implicitly or explicitly of a private or confidential nature or further correspondence that would reveal the contents of the original correspondence;
g. the views or opinions of another individual about the person;
h. the name of the person if it appears with other Personal Information relating to the person or if the disclosure of the name itself would reveal information about the person.

"processing" means any operation or activity or any set of operations, whether or not by automatic means, concerning Personal Information, including:

a. the collection, receipt, recording, organisation, collation, storage, updating or modification, retrieval, alteration, consultation or use;
b. dissemination by means of transmission, distribution or making available in any other form;
c. merging, linking, as well as restriction, degradation, erasure or destruction of information;

"record" means any recorded information:
a. regardless of form or medium, including any of the following:

i. Writing on any material;
ii. information produced, recorded or stored by means of any tape-recorder, computer equipment (hardware or software), or other device, and any material subsequently derived from such information;
iii. label, marking or other writing that identifies or describes anything of which it forms part, or to which it is attached by any means;
iv. book, map, plan, graph or drawing;
v. photograph, film, negative, tape or other device in which one or more visual images are embodied so as to be capable, with or without the aid of some other equipment, of being reproduced;

b. in the possession or under the control of a responsible party;
c. whether or not it was created by a responsible party; and
d. regardless of when it came into existence;

"responsible party" means a public or private body or any other person who, alone or in conjunction with others, determines the purpose of and means for processing personal information;

Examples of Personal Information include:

- A person's name and address (postal and email)
- Date of birth
- Statements of fact (factual statements)
- Any expression or opinion communicated about an individual
- Minutes of meetings, reports
- Emails, file notes, handwritten notes, sticky notes
- Photographs and virtual meeting and CCTV footage if an individual can be identified by the footage
- Employment and student applications
- Spreadsheets and/or databases with any list of people set up by code or student/staff ID
- Employment number
- Employment or education history

Special Personal Information includes:
Any information relating to an individual's:

- Ethnicity
- Gender
- Religious or other beliefs
- Political opinions
- Membership of a trade union
- Sexual orientation
- Medical history
- Offences committed or alleged to have been committed by that individual
- Biometric details
- Children's details

3. PURPOSE FOR THE COLLECTION
3.1 The purpose for the collection of your Personal Information and the reason why SAMRC requires your Personal Information is to enable SAMRC to:

3.1.1 to verify your legitimacy and credibility, including your compliance with lawful obligations, applicable labour, tax, procurement, financial legislations and/or the B-BBEE laws;
3.1.2 to give effect to a contractual relationship as between you and SAMRC and in order to ensure the correct administration of the relationship;
3.1.3 for operational reasons including the conducting of research;
3.1.4 to protect the legitimate interests of SAMRC, yourself or a third party;

3.2 All Personal Information which you provide to SAMRC will only be used for the purposes for which it is collected.

4. CONSEQUENCES OF WITHHOLDING CONSENT OF PERSONAL INFORMATION
Should you refuse to provide SAMRC with your Personal Information, which is required by SAMRC for the purposes indicated above, and the required consent to process the aforementioned Personal Information, then SAMRC will be unable to engage with you or enter into an agreement or relationship with you.

5. STORAGE AND RETENTION, AND DESTRUCTION OF INFORMATION

5.1 All Personal Information that you provide to SAMRC will be held and/or stored securely and held for the purpose for which it was collected, as reflected above.
5.2 Your Personal Information will be stored electronically in a centralised database, which, for operational reasons, will be accessible to authorised persons within SAMRC.
5.3 Where appropriate, some information may be retained in hard copy.
5.4 In either event, storage will be secure and audited regularly regarding the safety and the security of the information.
5.5 Once your Personal Information is no longer required due to the fact that the purpose for which the information was held has expired, such Personal Information will be safely and securely archived for a period of 5 years or longer, especially should this be required by any other law applicable in South Africa. Thereafter, all your Personal Information will be permanently destroyed.

6. ACCESS BY OTHERS
SAMRC may from time to time have to disclose your Personal Information to other parties, and entities regulators and/or governmental officials but such disclosure will always be subject to an agreement which will be concluded between SAMRC and the party to whom it is disclosing your Personal Information, which contractually obliges the recipient of the Personal Information to comply with strict confidentiality and data security conditions.

7. RIGHT TO OBJECT
In terms of section 11(3) of POPIA, you have the right to object in the prescribed manner to SAMRC processing your Personal Information. On receipt of your objection, SAMRC will place a hold on any further processing until the cause of the objection has been resolved.

8. ACCURACY OF INFORMATION AND ONUS
POPIA requires that all your Personal Information and related details, as supplied, are complete, accurate, and up-to-date. Whilst SAMRC will always use its best endeavours to ensure that your Personal Information is reliable, it will be your responsibility to advise SAMRC of any changes to your Personal Information, as and when these may occur.

9. ACCESS TO THE INFORMATION BY THE DATA SUBJECT
You have the right at any time to ask the SAMRC to provide you with the details of any of your Personal Information which the SAMRC holds on your behalf; and the details as to what SAMRC has done with that Personal Information, Provided that such request is made using the standard section 51 PAIA process, which procedure can be accessed by downloading and completing the standard request for information form, housed under section 51 of the PAIA Manuals which can be found on our website (SAMRC-PAIA-Manual.pdf).

10. COMPLAINTS
You have the right to address any complaints regarding the processing of your Personal Information to the SAMRC Information Officer at info@mrc.ac.za or you may approach the Information Regulator complaints.IR@justice.gov.za.

11. DECLARATION AND INFORMED CONSENT
I declare that all Personal Information supplied to SAMRC is accurate, up to date, is not misleading and that it is complete in all respects.

I undertake to immediately advise SAMRC of any changes to my Personal Information should any of these details change.

By providing SAMRC with my Personal Information, I consent and give the SAMRC permission to process and further process my Personal Information as and where required, and acknowledge that I understand the purposes for which it is required and for which it will be used.

SIGN:

DATE: