

TERMS OF REFERENCE :THE APPOINTMENT OF A SERVICE PROVIDER FOR LONGITUDINAL RESEARCH ON POLICY IMPEDIMENTS AFFECTING CSOs OVER A THREE-YEAR PERIOD (2025 - 2028)

BID REF: NDA01/DMR01/25-26

BRIEFING SESSION	NO BRIEFING SESSION WILL BE HELD
CLOSING DATE	04 SEPTEMBER 2025
CLOSING TIME	12:00
SUBMISSION OF DOCUMENTS	<p>All proposals must be delivered at the NDA Head Office on or before the closing date and time. The Head Office address is 26 Wellington Road, Parktown, Johannesburg, 2193. Submissions must be strictly submitted inside the tender box, which is at the main entrance and accessible 24/7.</p> <p><i>Service providers outside of Gauteng are advised to send their documents by courier. NDA will not take responsibility for documents sent via postal services.</i></p>
SUPPLIER ENVELOPES	<p>The supplier's envelope/s MUST clearly have the description: "THE APPOINTMENT OF A SERVICE PROVIDER FOR LONGITUDINAL RESEARCH ON POLICY IMPEDIMENTS AFFECTING CSOs OVER A THREE-YEAR PERIOD (2025 - 2028)".</p> <ul style="list-style-type: none"> • ENVELOPE system will be used for the submission of bids: <p>Commercial Envelope</p> <p>This envelope must strictly contain price quotations plus all the mandatory documents as listed in section 19 of this document.</p> <p>Technical Envelope</p> <p>This envelope must strictly contain all info listed in section 10 of this document.</p>
SUBMISSION PACKAGING	<p>NB: All documents must be binded using Thermal and perfect bindings Submission.</p> <p>Bidders must submit 1 original document, 1 copy and a labelled memory/flash drive.</p>
LATE BIDS	Bids received after the closing date and time will not be accepted for consideration and where practicable, will be returned unopened to the Bidder(s).

Contact person for Commercial Queries is [Ms Nomvula Moloi & Ms Kedibone Sathekge](#) on **011 018 5535/5562** between 08h30 to 17h00 on weekdays. Queries can also be sent in writing to NomvulaM@nda.org.za/KediboneS@nda.org.za.

Contact persons for Technical Queries are:

1. [Dr. Nthabiseng Kraai](#) on 011 018 5507. Enquires can also be sent via Email via email to NthabisengK@nda.org.za and copy Ms Nthabiseng Nkhatau on NthabisengN@nda.org.za

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1. BACKGROUND & CONTEXT

The National Development Agency (NDA) is a Schedule 3A public entity established under the National Development Agency Act (No. 108 of 1998), as amended, and operates in accordance with the Public Finance Management Act (PFMA) of 1999. Section 3(2) of the NDA Act outlines the Agency's secondary mandate, which includes:

- (a) promoting consultation, dialogue and sharing of development experience between civil society and relevant organs of State, as well as debate on policy development; and*
- (b) undertaking research and publication aimed at providing the basis for development policy*

This reflects a recognition that Civil Society Organisations (CSOs), including non-profit organisations (NPOs/NGOs), community-based organisations, cooperatives, and social enterprises amongst others are all critical intermediaries in translating policy into grassroots action. The NDA's Strategic Plan (2025–2030) and Annual Performance Plan 2025/26 both underscore the importance of evidence-based support to CSOs as key drivers in poverty alleviation and the need for policy advocacy to improve the enabling environment for these actors. In line with this, the NDA has adopted a Policy Advocacy Framework (PAF) (2025) to guide its efforts in influencing policy and ensuring that research evidence drives advocacy and reform for the benefit of the civil society sector.

The National Development Agency operates with a dual legislative mandate: to eradicate poverty through direct interventions and to strengthen civil society's capacity as a developmental partner. This mandate reflects Amartya Sen's (1999) capability approach, which positions poverty as not merely income deprivation but as the absence of institutional frameworks that enable human development. The NDA's focus on Civil Society Organisations (CSOs) aligns with contemporary development theory that recognizes CSOs as critical intermediaries in translating policy into grassroots action (Edwards, 2014). The National Development Agency therefore has a legislative mandate to contribute towards the eradication of poverty and its causes by funding and strengthening the institutional capacity of Civil Society Organisations (CSOs).

In 2008, the NDA conducted a baseline study to map the state of CSOs in South Africa, which provided critical insights into the sector's challenges. The study revealed several structural weaknesses, including uneven geographical distribution of CSOs, funding volatility, and capacity constraints in rural areas. However, the civil society landscape has evolved significantly over the past fifteen years, necessitating updated analysis. Several key developmental trends motivate the need for a new longitudinal study: Three key developments motivate this longitudinal study:

- i. **Growth of Cooperatives:** South Africa has experienced a “cooperative renaissance.”

Post-2010 there was a 47% growth in registered cooperatives, especially in agriculture and renewable energy (DTIC, 2021). These member-driven enterprises straddle economic and social objectives but face unique governance and sustainability challenges that have not been fully assessed in recent research.

- ii. **Spatial Mismatch of Services:** Emerging evidence suggests a disjuncture between where CSOs are located and where poverty is most concentrated. Statistics South Africa (2022) reports that 68% of extreme poverty is concentrated in 23 district municipalities, yet only about 31% of registered CSOs operate in these high-poverty areas. CSOs tend to cluster in urban centres where infrastructure and funding opportunities are better, potentially leaving many impoverished rural communities under-served. This spatial disparity in the CSO landscape echoes broader concerns about subnational inequality and warrants rigorous geographical analysis.
- iii. **New CSO Modalities and Post-COVID Realities:** The rise of hybrid organisational models (NGOs blending social services with income-generation, social enterprises, etc.) and digital activism platforms has created a more complex CSO ecosystem. These new forms challenge traditional capacity-building approaches and regulatory classifications. The COVID-19 pandemic further accelerated shifts in how CSOs operate – with one survey indicating 62% of CSOs adopted permanent operational changes in response to the pandemic's pressures. This calls for examining how adaptable and resilient CSOs are in the face of shocks, and what policy support is needed in a post-COVID context.

Given their grassroots presence and networks, CSOs remain indispensable partners in reaching poor and marginalized communities. They operate on the frontlines of service delivery, leveraging local knowledge to address community-specific needs. However, the geographic distribution of CSOs relative to need has become a critical concern. Many CSOs gravitate towards urban or peri-urban areas with better infrastructure, access to donors, and support services. This urban concentration, while beneficial for operational efficiency, can lead to service gaps in rural and deep rural areas that often face the worst poverty. Preliminary mapping data indeed reveals that some of South Africa's poorest districts have the fewest active CSOs, whereas more affluent areas enjoy a higher density of civil society activity. Such a misalignment between where CSOs operate and where poverty is most severe undermines the equity and reach of poverty alleviation efforts. It highlights the need for strategic interventions to encourage a more balanced CSO presence across the country's socio-economic landscape.

In summary, the context indicates that while the CSO sector has grown and diversified, it continues to face structural and policy-related impediments that limit its potential impact. The NDA's strategic emphasis on evidence-based policy advocacy recognises that robust, up-to-date research is required to identify and address these impediments. This three-year longitudinal research project (2025–2028) is therefore

conceived against this backdrop, aiming to update the knowledge base on South Africa's civil society sector and to inform policy and programmatic reforms that can strengthen the sector's contribution to development. The project is fully aligned with the NDA's Strategic Plan 2025–2030 goal of creating an enabling environment for CSOs, as well as the Annual Performance Plan 2025/26 focus on leveraging research for policy influence and improved CSO support. It also operationalises the NDA's Policy Advocacy Framework by generating the evidence needed to drive advocacy initiatives and engaging stakeholders in dialogue for change.

2. PROBLEM STATEMENT

Despite the acknowledged critical role of CSOs in South Africa's poverty eradication efforts, there are significant gaps in current data and understanding of the sector's landscape and the barriers it faces. The NDA's 2008 study is now outdated, and no recent comprehensive database or analysis exists that captures the distribution, capacities, and needs of CSOs nationwide. Consequently, policymakers and development agencies (including the NDA) lack a reliable evidence base to design responsive interventions. A pressing issue is the misalignment between the distribution of CSOs and areas of greatest need. As noted, only roughly 31% of CSOs operate in districts accounting for nearly two-thirds of people in extreme poverty.

Many organisations cluster in easier-to-reach areas, leaving remote poor communities with few civil society services. This spatial mismatch suggests that without deliberate action, development resources may not reach the populations that need them most. Moreover, CSOs today contend with a range of structural and regulatory impediments that hinder their effectiveness. Restrictive regulations and burdensome compliance requirements (for example, complex registration and reporting procedures and other legislation) can overwhelm smaller community-based organisations. Policies and funding mechanisms often do not account for the realities of marginalised communities and grassroots actors, meaning CSOs and informal groups are sometimes excluded from meaningful participation in policy-making processes and leaving the sector in the periphery of the economy. Additional challenges include chronic funding instability (many CSOs rely on short-term donor funding or grants, with limited access to sustainable financing) and capacity deficits, especially in governance, financial management, and monitoring and evaluation. The COVID-19 pandemic and other shocks have further strained CSO resources, requiring adaptive strategies that not all organisations could implement.

In the absence of a current, comprehensive dataset on CSOs, including their geographic spread, focus areas, and institutional capacities, the NDA and its partners are operating with an incomplete picture. Likewise, there has been insufficient systematic analysis of how policy and regulatory frameworks are either enabling or constraining the civil society sector. These knowledge gaps make it difficult to target support or advocate for reforms effectively.

Thus, the central problem is a combination of information deficit and structural barriers. The NDA and

government lack up-to-date evidence on the CSO sector's scope and needs, while CSOs on the ground continue to face policy, regulatory, and resource constraints that limit their impact. This longitudinal study is designed to address this problem by generating new evidence and insights over a three-year period, focusing on how to remove or reduce the policy impediments and structural challenges that prevent CSOs (including NGOs, NPOs, FBOs, cooperatives, and social enterprises, etc) from fully achieving their role in poverty alleviation. The findings will enable data-driven decision making and advocacy to foster a more responsive, equitable, and enabling environment for civil society sector. In turn, this will contribute to a stronger and more sustainable civil society ecosystem, ensuring no community is left behind in South Africa's development trajectory.

3. SPECIFIC RESEARCH OBJECTIVES

- a. **Primary Objective:** Examine the policy framework and regulatory environment governing CSOs to pinpoint specific impediments that hinder their formation, funding, or functioning. This will include reviewing laws, regulations and compliance requirements (such as the Non-Profit Organisations Act, Cooperative Act, tax regulations, funding norms, etc.) and gathering evidence on how these are experienced by CSOs. The study will document challenges like registration delays, onerous reporting obligations, funding restrictions, or any misalignment between government programs and the realities of CSOs on the ground. The ultimate intent is to produce actionable knowledge that the NDA and other stakeholders can use to advocate for an improved enabling environment (removing policy impediments) and to design programs that support CSOs more effectively.
- b. **Sub-Objectives: Specifically, the study will seek to achieve the following sub-objectives:**
 - i. Develop a comprehensive profile of CSOs across all nine provinces, detailing their geographic distribution (urban, peri-urban, rural), sectoral focus areas (e.g. Arts & Crafts, Agro-Processing, Capacity Building, Manufacturing, agriculture, etc.), organisational types (traditional NPOs/NGOs, community-based organisations, cooperatives, hybrid social enterprises), size, and the services they deliver. This will involve creating and maintaining a central CSO database that consolidates information from various registries and new field data.
 - ii. Generate a robust evidence base on the landscape, challenges, and needs of Civil Society Organisations (including cooperatives and social enterprises) in South Africa, in order to inform policy reform and strategic interventions that will strengthen the sector's capacity to contribute to poverty eradication.
 - iii. Investigate the funding models and financial health of CSOs. Document the main sources of funding (government grants, donor funding, corporate social investment, self-generated income, etc.) and the extent of financial instability or dependency (e.g. reliance on a single donor). Identify barriers to accessing funding (such as complicated grant requirements or lack of access to finance for unregistered groups) and highlight opportunities for more sustainable financing mechanisms

for the sector.

- iv. Based on the evidence collected, develop targeted recommendations to enhance the effectiveness and sustainability of CSOs. This will include recommendations for policy or regulatory reforms (e.g. simplifying compliance processes, improving CSO inclusion in policy dialogues, adjusting funding policies) in line with the NDA's policy advocacy goals. It will also include programmatic recommendations for the NDA and other stakeholders, such as capacity- building initiatives, funding support strategies (like dedicated grant funds or blended finance for CSOs), and mechanisms to improve coordination between CSOs and government. These recommendations will be packaged to inform advocacy efforts (through policy briefs, stakeholder engagements) as well as NDA's internal strategic planning.

4. RESEARCH QUESTIONS

To meet the above objectives, the study will be guided by one primary research question and several sub-research questions:

a. **Primary Research Question:**

What are the key structural and policy impediments affecting civil society organisations in South Africa, and how can evidence-based insights inform reforms and interventions to enhance the impact of these organisations on poverty alleviation?

b. **Sub-Research Questions:**

- a) What is the current distribution and footprint of CSOs (including NGOs, NPOs, cooperatives, and social enterprises) across South Africa's provinces and municipalities, and how does this distribution correspond to areas of high poverty and social need? This question seeks to identify geographic gaps or overlaps in CSO coverage, testing the hypothesis that certain high-poverty regions are under-served by civil society activities.
- b) **Policy and Regulatory Framework:** How do existing policies, laws, and regulatory requirements influence the establishment and operations of CSOs? What specific policy impediments, or bureaucratic hurdles constrain the effectiveness of CSOs? This will explore issues such as registration processes, compliance/reporting burdens, Municipal By-Laws, legal restrictions, and the extent to which current government frameworks facilitate or hamper civil society work.
- c) **Funding and Sustainability:** What are the primary funding sources for CSOs, and what challenges do these organisations face in achieving financial sustainability? The sub-questions include: Do CSOs have diversified funding or are they heavily donor-dependent? Are there funding gaps in certain sectors or regions? What funding models or support mechanisms could improve sustainability?
- d) **Operational Capacity and Needs:** What is the operational capacity of CSOs in terms of skills, governance, and infrastructure, and where are the most critical capacity gaps? How do factors such as the size of the organisation or its location (urban vs rural) affect its capacity to deliver services? This

question also looks at how CSOs have adapted to recent challenges (e.g. pandemic, technology shifts) and what support they need to build resilience.

- e) **Changes Over Time:** How has the landscape of CSOs and the challenges they face changed since the last comprehensive study in 2008, and over the course of the three-year study period? This involves examining trends and evolutions, for instance, growth or decline in certain types of CSOs, shifts in geographic distribution, changes in funding patterns, and the emergence of new issues or improvement of previously identified problems. By revisiting certain questions each year, the longitudinal design will capture dynamic changes and the effects of any interventions or external events during 2025–2028.

These research objectives and questions will guide data collection and analysis. They collectively cover the impact of policies, funding dynamics, operational capacities, the regulatory environment CSO geography, ensuring that the study addresses the multi-faceted nature of the problem. Answering these will provide the NDA with a holistic understanding of how to better support and enable civil society to be actively involve in the mainstream economy and contribute towards the eradication of poverty. The will not only diagnoses the current state and challenges of the civil society sector but also points toward concrete actions both within the NDA's mandate and in the broader policy arena to strengthen the sector. Achieving these objectives will directly support the NDA's Strategic Plan imperatives of evidence-based programming and the NDA's Policy Advocacy Framework aim of influencing policy to empower CSOs.

5. METHODOLOGY AND APPROACH

This study will employ a primary research approach with a longitudinal, mixed-methods design over three years. The service provider is expected to detail a rigorous methodology that collects both quantitative and qualitative data from multiple sources, ensuring comprehensive and credible findings. Key aspects of the proposed methodology include:

- a. **Study Design:** A three-phase longitudinal design (baseline in Year 1, Mid-Term/Follow-up in Year 2, and final assessment in Year 3)
- b. **Study Subjects and Sampling:** The study will cover multiple types of CSOs, including NGOs/NPOs, less formal community-based organisations, cooperatives, and social enterprises as study subjects. A stratified sampling strategy should be employed to ensure representation across key strata such as geography (e.g. each province, urban/rural), organisational size (small community-based vs. large national NGOs), and sector of activity. For the quantitative component, the sample is expected to be large enough to allow meaningful disaggregation (potentially several hundred organisations surveyed). Stratification will ensure that smaller or rural-based CSOs are included, not just well-known urban NGOs. Where possible, the study will build on existing lists (e.g. NDA Supported CSOs, the Department of Social Development's NPO registry, the Department of Trade, Industry and Competition's cooperative registry, etc.) to construct the sampling frame. Multiple units of analysis should be considered, for example, individual CSOs (for surveys), key informants (for interviews), and possibly community

beneficiary perspectives (for example in focus groups) to gain a 360-degree understanding.

- c. **Use of Mixed Methods:** By combining quantitative mapping of the sector with qualitative inquiry, the research will ensure both breadth and depth of understanding. Quantitative data will allow identification of broad patterns (such as the extent of geographic mismatches or common funding challenges), while qualitative data will help explain the *why* and *how* behind those patterns.
- d. **Database of CSOs.:** Given the importance of geographic distribution, the collected data on CSO geographic locations in all nine (9) Provinces, (Province, District Municipality, Local Municipality), sector, Type of Registration and contact details is crucial for the NDA. The deliverables should include an EXCEL or any form of a Database of these for the NDA to use in planning and advocacy.
- e. **Ethical Research Practices:** All research activities must adhere to high ethical standards. Given that primary data will be collected from individuals and organisations, the service provider must obtain an Ethical Clearance Certificate from a recognised institutional Research Ethics Committee (REC) before commencing data collection. This is a mandatory requirement to ensure that the study design and instruments have been reviewed for ethical compliance (respect for persons, no harm, etc.). The service provider should factor in time for the ethics approval.
- f. **Quality Control and Rigor:** The service provider is expected to outline measures for quality assurance, such as pilot-testing the survey tool, training enumerators, back-checking a sample of survey responses, and triangulating data from different sources. Use of appropriate analytical software is encouraged (e.g. statistical software for quantitative data and qualitative analysis software) to manage the data effectively. The methodology section of the proposal should clearly explain how the chosen approach will yield reliable, valid, and actionable results.

The study must ensure robust evidence is gathered on the status of CSOs and the policy environment. This approach aligns with NDA's emphasis on primary, field-based research and will provide a rich dataset that can be used well beyond the project for ongoing monitoring and advocacy. The longitudinal nature (repeated measures over three years) will also add significant value in distinguishing temporary setbacks from persistent structural problems, thereby sharpening the focus on which policy changes and support interventions are truly needed.

6. SCOPE OF WORK

The scope of this research is national study focusing in all the nine provinces and cross-cutting, reflecting the diverse and widespread nature of civil society in South Africa. Key dimensions of the scope include:

- a. **Geographic Coverage:** The study must cover all nine provinces, spanning urban, peri-urban (township), and rural areas in each province. Data collection will be sensitive to the District Development Model (DDM) context, ensuring that district and local municipalities are examined to capture granular disparities. Particular attention will be given to rural and under-resourced districts (especially those identified as poverty hotspots) to ensure the study highlights areas where CSO presence is lacking. Urban centres will also be studied, as they have high concentrations of CSOs which may present

different challenges (e.g. competition for funding, overlap of services). By comparing urban and rural findings, the study can be able to recommend strategies to balance service provision across geographies.

- b. **Sectoral Coverage:** Civil society in South Africa engages in a wide range of development sectors. The research will include CSOs working in education and skills development (e.g. literacy programs, early childhood development, youth training, etc), health (e.g. HIV/AIDS services, community health workers, mental health support), agriculture and food security (e.g. farming cooperatives, community gardens, nutrition programs, etc), economic empowerment and job creation (e.g. cooperatives in manufacturing, social enterprises for livelihoods, microfinance groups), social services and welfare (e.g. child protection NGOs, disability support organisations, etc), and cross-cutting or emerging sectors such as environmental sustainability (e.g. renewable energy cooperatives, conservation groups) and digital rights/activism. This broad sectoral scope ensures that the study captures any sector-specific policy issues (for example, cooperatives in agriculture may face different regulatory issues than NGOs in health, etc) and looks at how resources are distributed across development priorities.
- c. **Types of Organisations (Population of Interest):** The study will consider both registered and unregistered entities to accurately reflect the civil society ecosystem. Registered entities include those formally registered as NPOs under the NPO Act, public benefit organisations (PBOs with SARS), Section 21 companies (non-profit companies), trusts, and cooperatives registered with the CIPC. However, many community-level initiatives and emerging social enterprises might operate informally or are in early stages of registration; these unregistered Community-Owned Enterprises or CSOs are often crucial in their communities and must be included through snowball sampling and consultation with local networks. Cooperatives (which blend member economic participation with community development goals) are also explicitly included in the scope, given their increasing prominence. The inclusion of a variety of organisational forms will allow the research to comment on differences in needs and challenges across these forms (e.g. the support required by a cooperative vs. a traditional NGOs).
- d. **Time Frame and Longitudinal Scope:** While the project's implementation spans 2025 to 2028, its analytical scope will be both retrospective and forward-looking. Year 1 will capture baseline data. In Years 2 and 3, the scope includes tracking developments that occur during the project (e.g. new policies introduced, funding shifts, or the impact of any NDA interventions initiated). Within this broad scope, the service provider is expected to manage the work by possibly breaking it into sub-studies or workstreams (e.g. a workstream on policy/regulatory analysis, one on CSO mapping, one on case studies, etc.), while maintaining a coherent overall framework. The NDA will facilitate connections with provincial offices and other stakeholders to assist with access to various regions and networks. All research activities must remain within the boundaries of this defined scope unless otherwise agreed upon with the NDA ensuring focus on the core objective of understanding and addressing policy impediments affecting CSOs across South Africa.

7. STAKEHOLDER ENGAGEMENT

Strategic stakeholder engagement is a crucial component of this longitudinal study, both as an input to the research and as part of the dissemination and advocacy strategy for the findings. The NDA envisions involving key stakeholders notably CSOs themselves, relevant government departments, and development partners/donors throughout the research process to enhance relevance, buy-in, and impact. Key elements of the stakeholder engagement approach include:

- a. **Consultative Research Process:** The service provider should incorporate forums for stakeholder input at various stages. For instance, at project inception, consultation workshops or meetings with CSO networks, government officials (e.g. Presidency, National Treasury, DSD, COGTA, etc.), and donor representatives to refine the research questions and ensure the study addresses priority concerns. Similarly, after the Year 1 baseline data collection, a validation workshop (or a set of provincial workshops) with CSO representatives and NDA staff could be held to discuss preliminary findings, test interpretations, and fill information gaps. This participatory approach will enrich the data and ensure that the perspectives of those on the ground are reflected accurately.
- b. **Policy Roundtables and Dialogues:** As part of the project deliverables (detailed below) formal policy roundtable events will be convened in Year 1 and Year 2, and a larger National Policy Dialogue in Year 3. These events are platforms to bring together stakeholders such as CSO leaders, government policymakers, NDA leadership, private sector partners, and donors to engage with the research findings and co-create solutions. For example, the Year 1 roundtable will focus on the baseline results, allowing stakeholders to discuss implications (such as what the geographic gaps mean for policy) and raise additional questions. The Year 2 roundtable will examine trends and mid-term findings, helping to prioritise which emerging issues need policy attention. Finally, the national dialogue at the end of the project will serve to present the consolidated findings and recommendations to a broad audience and to ignite commitment for implementing the recommended reforms or actions. These are mainly to ensure that the research is not conducted in isolation but is continually interfacing with the real-world policy environment. ***(The cost for all the Roundtables are not part of the Study cost, the NDA will cover the cost for these but the Service Provider will be expected to present the findings at the Roundtables)***
- c. **Communication and Dissemination:** The study will produce user-friendly outputs (like policy briefs and summaries) for stakeholders. The NDA, with the appointed service provider's support, will disseminate these through its networks and through media or online platforms. The NDA's Policy Advocacy Framework stresses the use of evidence to influence policy; hence, the stakeholder engagement plan will align with that by actively using the research findings to spark discussions in existing forums (like parliamentary committees, civil society forums, donor roundtables).
- d. **Donor and Partner Engagement:** Donor agencies and international development partners often support CSO initiatives and have a stake in the policy environment for civil society. Their input is important in providing comparative perspectives (how South Africa's situation compares to other

countries or global best practices) and potentially mobilise resources or support for implementing recommendations. Engaging donors will also ensure that the study's findings reach those who fund CSOs, encouraging them to tailor funding strategies in light of the evidence (such as addressing funding gaps or supporting capacity-building where needed).

In concluding this section, this research will not only gather richer data but also intend to build a constituency for change and tangible actions and policy improvements. The process itself becomes an advocacy tool as stakeholders discuss and acknowledge the issues facing CSOs, they become more likely to collaborate on solutions.

8. DELIVERABLES AND OUTPUTS

Over the course of the three-year project, the service provider will be expected to produce a set of key deliverables for each financial year, as well as undertake activities that culminate in those outputs. The following are the major outputs for each year.

Year 1 (2025/26): Baseline Findings Report, Policy Brief, and Policy Roundtable.

- **Baseline Findings Report:** A comprehensive report detailing the results of the Year 1 baseline study. This report will profile the CSO landscape (distribution maps, sectoral breakdowns, organisational characteristics) and highlight initial findings on challenges (e.g. preliminary identification of policy impediments, capacity gaps, funding patterns). It should include an executive summary and be suitable for both internal NDA use and external stakeholders.
- **Policy Brief:** A concise (4-6 page) brief summarising the baseline study's key insights and their policy implications. The brief should distil the evidence into a format accessible to policymakers, outlining the problem (e.g. CSO misalignment or regulatory burdens) and recommending immediate considerations for policy or practice. This will be used by the NDA to engage decision-makers in dialogue.
- **Policy Roundtable:** A stakeholder engagement event organised by the NDA (toward the end of Year 1 or start of Year 2) to discuss the baseline findings. The service provider will provide content support (presentation of findings, slides, etc.) while the NDA convenes CSO representatives, government officials, and donors. The roundtable's output could be a proceedings report or a set of agreed action points to inform Year 2 focus areas.

Year 2 (2026/27): Mid-Term Progress Report, Policy Brief, and Roundtable.

- **Mid-Term Report:** An analytical report documenting the findings of the second year of research. This will include trend analysis comparing Year 2 data with the baseline (e.g. noting any changes in CSO numbers or capacities), deeper exploration of issues identified in Year 1 (for instance, more detailed analysis of a particular barrier or case studies), and an update on the status of the CSO database. Identification of any emerging issues or external developments (such as new policies affecting CSOs)

that occurred during the year.

- **Policy Brief:** Another short brief (4-6 pages) focusing on the mid-term findings and urgent policy issues. For example, if the research in Year 2 highlights a critical regulatory bottleneck or a region in crisis due to lack of CSOs, the brief would spotlight this and provide evidence-based recommendations or questions for policymakers. This brief will help maintain momentum in advocacy between the baseline and the final results.
- **Stakeholder Roundtable:** Similar to Year 1, a roundtable (or series of workshops) will be held to discuss the mid-term results with stakeholders. By Year 2, the discussion can be more focused on prioritising solutions, since preliminary recommendations will be taking shape. The roundtable might be used to test the feasibility of certain recommendations with those who would implement them (e.g. government departments or CSO networks), ensuring that the final year's research and reporting refine those proposals.

Year 3 (2027/28): Final Longitudinal Study Report, Policy Brief(s), and National Policy Dialogue.

- **Final Longitudinal Report:** A comprehensive final research report that synthesises all findings from Year 1 to Year 3. This report will serve as an authoritative reference on the state of CSOs in South Africa and the policy impediments affecting them. It should cover the methodology, detailed findings (with comparisons over time), and put forward a clear set of conclusions and recommendations. Importantly, it will include evidence-based recommendations for policy reform and practical interventions, explicitly aligned to the NDA's Policy Advocacy Framework goals. An executive summary and a standalone set of recommendations for easy reference.
- **Policy Brief(s):** In the final year, at least one policy brief (and possibly a set of them focusing on different themes) will be produced to encapsulate the critical recommendations for policy and practice. For example, the project might issue one policy brief on "Reducing Regulatory Burdens on CSOs" and another on "Improving CSO Access to Funding," depending on the findings. These briefs will be used in engaging various government departments or stakeholders on specific actions.
- **National Policy Dialogue:** An engagement event to present the study's final outcomes and discuss the way forward. The NDA will host a National Policy Dialogue (or summit) bringing together senior government officials, policymakers, civil society leaders from across the country, donor agencies, and other influential actors etc. The service provider will assist in preparing presentation materials, summaries of evidence, and participate in presenting the findings.

In addition to these main outputs, the service provider is expected to deliver supporting materials such as raw and cleaned datasets (the CSO database), transcripts of qualitative interviews. All reports and briefs should be delivered in editable formats (e.g. Microsoft Word for text reports, and an appropriate format for data and maps) to allow the NDA to adapt or extract information for future use.

Each deliverable will be subject to review and approval by the NDA. The NDA's Research unit will provide feedback to ensure that outputs meet the required quality and align with NDA's messaging and strategic objectives. The timeline for delivery of each output will be specified in the three-year signed SLA between the NDA and the appointed Service Provider, with Year 1 outputs expected by the end of March 2026, Year 2 outputs by March 2027, and final outputs by March 2028 (to coincide with the financial year-end and reporting cycles).

9. PROJECT TIMELINES AND MANAGEMENT

The project will run for a total of **36 months (3 years)** from the date of commencement date as per the SLA. It will be structured in phases corresponding to the three financial years:

- **Phase 1: Baseline Study (2025/26)** –This includes project inception, Research protocol, Instruments development and ethics approval, data collection, data analysis and preparation of the Baseline Report and Policy Brief. The Year 1 Policy Roundtable to discuss Baseline findings as the year concludes.
- **Phase 2: Follow-up Study and Mid-Term Review (2026/27)** –Early in Year 2, any necessary adjustments to methodology are made based on Year 1 lessons. Follow-up data collection and additional qualitative research occur. Data analysis and Mid-Term Report and Policy Brief. The stakeholder roundtable for Year 2 o Mid-Term Report.
- **Phase 3: Final Study and Dissemination (2027/28)** – Year 3 will focus on final data collection (if any additional surveys or follow-ups are needed), final analysis and synthesis of all data and producing the Final Report and final briefs. The National Policy Roundtable on the final Longitudinal Report. The project wraps up by month 36 with final administrative closure and handover of all datasets and materials to the NDA.

Regular progress meetings (likely quarterly, and after each major milestone) will be held between the NDA Research Unit and the service provider to monitor progress, address challenges, and ensure alignment with NDA's needs. The service provider will be responsible for project management on a day-to-day basis, including fieldwork coordination, data management, and maintaining the timeline.

Note: Bidders must cost the entire study across the three phases. Each phase must include a detailed breakdown of costs aligned with the deliverables and implementation timelines. Cost proposals must avoid lump sums and be structured around output-based activities .

10. TECHNICAL EVALUATION -PHASE 1

The following criteria will be used: After the closing date for the bid invitation, an appointed evaluation committee of NDA officials will evaluate the proposals.

The committee will evaluate each of the bid proposals received against the approved criteria as stated below:

10.1 Phase 1: Functionality/ Technical Evaluation)

A minimum threshold of **70points** should be obtained to qualify for the second phase of evaluation “Commercial Evaluation”.

Bid responses will be evaluated in accordance with the Technical/functional evaluation criteria as follows:

DESCRIPTION	WEIGHT
1. PROJECT MANAGEMENT AND QUALITY ASSURANCE	10
<p>Clear and Comprehensive project plan including timelines, risk mitigation, quality assurance mechanisms, and logistics for national coverage broken down into YEAR 1 – YEAR 3</p> <p><i>(A Workplan with no tasks/Activities, timelines for each task and milestones and all of the above will not be considered and will lead to a score of zero)</i></p>	
2. PROPOSED METHODOLOGY AND APPROACH	48
<p>2.1. Robustness and clarity of proposed primary and mixed-method research approach, sampling strategy, data collection techniques, and analytical methods aligned to the longitudinal nature of the study. Also includes stakeholder engagement strategy – 38 Points</p> <p>2.2. Ethical Clearance and Compliance: Comprehensive approach to obtaining Ethical Clearance Certificate from an accredited Research Ethics Committee and managing informed consent, privacy, and data confidentiality throughout the study - 10 Points</p> <p><i>The proposed approach will be assessed on its feasibility and practicality as well as how well the approach addresses the Objective of the Study.</i></p>	
3. MINIMUM QUALIFICATIONS AND EXPERIENCE	27
<p>3.1 Project Leader/Principal Investigator:</p> <ul style="list-style-type: none"> • PhD or master’s degree in development studies, Sociology, Economics, Public Policy, Social Sciences or related (Proof of Academic certificate not transcript of results) - 2 Points • Minimum of 10 years’ experience in leading research studies, preferably in civil society/NGO, policy analysis, or socio-economic development. Proven track record in 	

managing large-scale, multi-year research projects 4 Points

3.2. Minimum Requirement for Core Technical Team (At least 3 senior/core specialists)

3.2.1. Quantitative Specialist (1)

- Master's degree or higher in Statistics, Economics, or related field. 2 Points
- At least 7 years' experience in quantitative research, quantitative survey/instruments design, and statistical modeling. 3 Points
- Experience with quantitative data analysis software packages (SPSS, Stata, R, or equivalent). 2 Points

3.2.2. Qualitative Specialist (1)

- Master's degree or higher in Sociology, Anthropology, Development Studies, or related social science field. 2 Points
- Minimum 7 years' experience conducting qualitative research, including key informant interviews, focus groups, and case studies. 3 Points
- Familiarity with qualitative data analysis software (NVivo, Atlas.ti, or equivalent). 2 Points

3.3.3. Policy Analysis Specialist (1)

- Master's degree or higher in Public Policy, Law, Economics, or related discipline. – 2 Points
- At least 7 years' experience in policy analysis, particularly in civil society regulatory frameworks, NPO legislation, cooperatives, or related policy fields. 3 Points
- Demonstrated experience in producing policy papers and influencing policy processes. – 2 Points

Organogram or Table of all Project Team members with their roles in the project must be provided, other team members such as field researchers, enumerators, etc. can be added on the Organogram but will not be scored. All qualification certificates must be certified by the Commissioner of Oath (certification should be within 06 months). Failure to submit certified proof of qualification will not be considered and will result in a score of zero.

CVs of each team member including the project lead must be attached indicating the number of years regarding the experience only related to this exercise/project.

4. PROVEN RECORD AND REFERENCES

Demonstrated experience in similar multi-year national research projects. Proposals must include a **MINIMUM** of three signed client reference letters on letterhead, verifying prior work on multi-year, multi-stakeholder research studies. Letters must detail scope, duration, and contact

information.

- a) 3 Client Reference Letters = 9 Points
- b) 4 Client Reference Letters = 12 Points
- c) 5 Client Reference Letters and more = 15 Points

The reference letters from clients of a service provider must include:

- Client letterhead and dated
- The letter must indicate the scope and the year in which the project was done and the duration of the study
- Contact person, contact numbers and email address.
- The letter must be signed by a duly authorized person.

Reference letters not meeting ALL of the prescribed criteria on point 4 will not be considered.

Please note that an email will not be accepted. These must be Official signed off letters.

TOTAL SCORE

MINIMUM QUALIFYING SCORE

11. TECHNICAL EVALUATION SCORE CLARIFICATION

1. PROJECT MANAGEMENT AND QUALITY ASSURANCE			WEIGHT
Clear	Partially Clear	Not Clear	10
7 - 10	4 – 6	0 – 3	
2. PROPOSED METHODOLOGY AND APPROACH			
Clear	Partially Clear	Not Clear	48
31– 48	16 – 30	0 - 15	
3. ETHICAL CLEARANCE AND COMPLIANCE			
Clear	Partially Clear	Not Clear	10
7 - 10	4 – 6	0 – 3	

12. COMMERCIAL EVALUATION

- (a) Bids will be evaluated in accordance with the NDA's Supply Chain Management Policy and Preferential Procurement Policy, 2023, using the 80/20 preference points system as prescribed in the Preferential Procurement Policy Framework Act (PPPFA, Act 5 of 2000). The lowest acceptable bid will score 80 points for price (the lowest acceptable bid will score 80 points and bidders that quoted higher prices will score lower points for price on a pro-rata basis).
- (b) The bid proposals received will be evaluated in two (2) phases. On the first phase bids will be evaluated on functionality and on the second phase in accordance with the 80/20 preference points system respectively.
- (c) Bid proposal must score a minimum of Seventy (70) points out of hundred (100) points on functionality in order to qualify for advancement to the next phase of evaluation. Second phase, a bid proposal scoring less than Seventy (70) out of 100 will not be considered for further evaluation and will be disqualified.
- (d) Phase two: During this phase, bid proposals that passed the first phase will be further evaluated based on the 80/20 preference points system in accordance with the PPPFA Act, where 80 points will be attained in respect of price (the lowest acceptable bid will score 80 points and bidders that quoted higher prices will score lower points for price on a pro-rata basis), 10 points will be awarded for Enterprises owned by black people, 4 points will be allocated to enterprises located in rural/underdeveloped/township areas, 4 points will be allocated to enterprises owned by black African youth, and 2 points for enterprises owned by Black African women. The CSD **I AM register** report will be used to allocate points and the (80/20 system) will be applied in accordance with the table below:

Specific Goal	Number of points (80/20 system)
Enterprises owned by black people (<i>must be included as a specific goal</i>)	10 points % shareholding by black people will determine the points
Enterprises located in a specific: <ul style="list-style-type: none"> Rural/Underdeveloped /Townships (within South Africa) <i>(A certified proof of address (municipal rates/stamped letter from a councillor) must be attached to claim points. The NDA will verify location using CSD report</i>	4 points Should no certified proof of address be supplied, the bidder will score zero but will not be disqualified.

Enterprises owned by black African youth.	<p>4 points</p> <p>% shareholding by the targeted group will determine the points that are scored</p>
Enterprises owned by black African women	<p>2 points</p> <p>% shareholding by the targeted group will determine the points that are scored</p>

- (e) The highest ranked bidder will be awarded the bid. It should be noted also that the NDA reserves the right not to appoint any service provider, and no service provider will be reimbursed for any costs incurred whilst participating in this bid.

13. JOINT VENTURES, CONSORTIUMS, TRUST, PARTNERSHIP AND OR ANY FORM OF AGREEMENT.

A joint venture, consortium, trust, partnership or any form of agreement will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A joint venture, consortium, trust, partnership or any form of agreement will qualify for points for their B-BBEE status level as an unincorporated entity if the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Bidders must submit concrete proof of the existence of joint ventures, consortiums, trusts, partnership or any form of agreement. The NDA will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.

When bidding through a Joint Venture, consortium, trust, partnership or any form of agreement, bidders must submit a Consolidated B-BBEE certificate if it is not an incorporated entity when responding to tenders. This means that the bidder will have to obtain a new B-BBEE certificate for the Joint Venture, which consolidates each participant's B-BBEE status level.

All Joint ventures, consortiums, trust, partnership or any form of agreement must submit completed and signed SBD forms of each company separately.

14. CLIENT BASE

The NDA reserves the right to contact references" **conduct due diligence**" during the evaluation and adjudication process to obtain information.

15. PACKAGING OF THE BID DOCUMENTS

The bidder shall place both the sealed Technical Proposal and Price/ Commercial Proposal envelopes into an outer sealed envelope or package, and must be clearly marked as follows:

15.1 Functionality/Technical Envelope

Bid Ref: NDA01/DMR01/25-26

**THE APPOINTMENT OF A SERVICE PROVIDER FOR LONGITUDINAL RESEARCH ON
POLICY IMPEDIMENTS AFFECTING CSOs OVER A THREE-YEAR PERIOD (2025-2028)**

Bid closing date and time: 04 September 2025 at 12h00 Name and address of the bidder:

In this envelope, the bidder shall only address the technical aspects of the bid as per Section 10 of this document.

15.2 Pricing/Commercial Envelope

Bid Ref: NDA01/DMR01/25-26

**THE APPOINTMENT OF A SERVICE PROVIDER FOR LONGITUDINAL RESEARCH ON
POLICY IMPEDIMENTS AFFECTING CSOs OVER A THREE-YEAR PERIOD (2025-2028)**

Bid closing date and time: 04 September 2025 at 12h00 Name and address of the bidder:

In this envelope, the bidder shall only provide the price/commercial proposal, and the Mandatory documents outlined in section 19 of this document.

16. PRICING

- (a) Bidders must submit a detailed cost breakdown for all applicable costs e.g. Initial setup costs, monthly costs, and any other applicable costs. All prices submitted must be inclusive of VAT.
- (b) Bidders must indicate if their prices will be fixed and firm for the duration of the proposed contract period, if not, the proposed escalations should be indicated.

- (c) Bidders must ensure that the quotes submitted have no arithmetic errors as NDA will not rectify any errors and no adjustments to quotations received will be permitted.
- (d) Bidders will carry the responsibility of ensuring that the proposals submitted have been signed by a duly authorised person. Should it be established after the submission of proposals that the signatory authorising the proposal is not legally appointed by the service provider, the offer/proposal will be disqualified from the evaluation process.
- (e) All prices submitted should be typed in black ink or written in pen, proposals written in pencil will not be accepted and evaluated.
- (f) A two-envelope system will be used for the submission of proposals.

17. TENDER VALIDITY

All submitted bids must be valid for 150-days from the closing date of this bid.

18. NDA PAYMENT TERMS

Invoices will be paid 30-days from the date of submission and approval. All invoices must be sent to the following e-mail address: ictaccounts@nda.org.za

19. MANDATORY DOCUMENTS

(a) (Valid Tax Clearance Certificate issued by the South African Revenue Services

(SARS). Where consortium/joint ventures/sub-contractor are involved in each party to the association must submit a separate valid original Tax Clearance Certificate or SARS tax Pin or a CSD report. Alternatively, service providers must fully complete Standard Bid Document 1 (SBD 1) to give effect to the tax compliance status system.

- (b) Signed agreements for joint ventures, consortiums, trust, partnership or any form of agreement.

Bidders must also submit completed and signed SBD forms of each company separately.

- (c) Company registration documents (CIPC).
- (d) A letter/resolution authorising the person signing the bid documents and contracts.
- (e) All participating bidders must complete, sign and return ALL the attached SBD forms (SBD1, 3.3 (supported or together with a detailed excel cost breakdown), 4 & 6.1) together with their proposals **NB: Bidders must claim specific goals by completing the SBD 6.1 (Failure to claim the specific goals points will result in not allocating the points). The points claimed will be verified using “CSD I AM REGISTERED”.**

Failure to complete and submit any of the attached documents will result in immediate disqualification.

20. CENTRAL SUPPLIER DATABASE

The NDA will not appoint any supplier who is not registered as a prospective supplier on the central supplier database as required in terms of National Treasury Circular No. 3 of 2015/2016 and National Treasury SCM Instruction note 4 of 2016/2017.

21. CONTRACT AWARD

A binding contract will be signed after both parties have fully agreed to the scope of work and all terms and conditions. The NDA legal department will develop a draft contract that shall be used as the basis to finalise contract terms and conditions.

22. DISCLAIMER

- (a) Whilst all due care has been taken in connection with the preparation of this bid, the NDA makes no representations or warranties that the content in this bid or any information communicated to or provided to bidders during the bidding process is, or will be, accurate, current or complete. The NDA and its officers and employees will not be liable for any information communicated which is not accurate, current or complete.
- (b) If a bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by the NDA (other than minor clerical matters); the bidder must promptly notify NDA in writing of such discrepancy, ambiguity, error or inconsistency to allow the NDA to consider what corrective action is necessary (if any).
- (c) Any actual discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by the NDA will, if possible, be corrected and provided to all bidders without attribution to the bidder who provided the written notice.
- (d) No representations made by or on behalf of NDA about this bid will be binding on the NDA unless that representation is expressly incorporated into the contract ultimately entered into between NDA and the successful bidder.

23. ADDITIONS AND AMENDMENTS TO THE BID

- (a) The NDA reserves the right to change any information in, or to issue an addendum to this bid before the closing date and time. The NDA its officers and employees will not be liable in connection with either the exercise of or failure to exercise this right.
- (b) Should the NDA exercise its right to change the information in terms of clause 22.1 all amendments will be communicated to all bidders.

24. CONTENT PAGE

Participating bidders are required to submit a detailed content page and page dividers clearly indicating (cross-referencing) where each of the technical requirements is placed in their bid documents exactly as outlined in **section 10** (technical evaluation criteria) of this TORs. Any additional information that the supplier would like to provide should be referenced as well on the content page.

25. PRICE NEGOTIATIONS

- (a) Where the bidder that scored the highest total points did not quote a reasonable or a market-related price, the NDA may negotiate with the bidder to offer a reasonable or market-related price, should the adjudicator agree to this:
- (b) Should the bidder scoring the highest total points not agree on a reasonable or market-related price, the NDA may cancel the bid or negotiate with the bidder that scored the second highest total points or the third highest total points, in that order.

26. SPECIAL COMMERCIAL CONDITIONS OF THIS BID

NDA reserves the right to:

- (a) To accept part of a tender rather than the whole tender.
- (b) To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the Bid.
- (c) To correct any mistakes at any stage of the tender that may have been in the Bid documents or occurred at any stage of the tender process.

- (d) To cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after presentations have been made, and/or after tenders have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.
- (e) Award to multiple bidders based either on size or geographic considerations.

26. ETHICS AND AWARENESS TO SERVICE PROVIDERS

NDA pledges towards high ethical conduct in dealing with Service Providers

- *NDA is committed to highest standard of ethics in conducting its business and encourages all stakeholders to contribute towards building ethical culture within the organization.*
- *NDA shall not demand money from Service Providers to get work (tenders and quotations) from the organization.*
- *Suppliers are prohibited to induce NDA employees through gifts in order to directly and indirectly benefit business from NDA.*
- *NDA has a strict gift policy to ensure that gifts received from Suppliers are properly declared to ensure transparency.*
- *Any unethical behaviour that is compromising by NDA employees shall be reported to Fraud/ethics Hotline:0800 701 701*

I HAVE READ AND UNDERSTOOD THE NDA PLEDGE THAT PROMOTE HIGHLY ETHICAL CULTURE. I WILL, TO THE BEST OF MY ABILITY, ADHERE TO AND HONOUR THIS PLEDGE IN MY PROFESSIONAL DEALINGS WITH NDA.

Signature: Representative of the Service Provider

Date

Name: Representative of the Service Provider

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)					
BID NUMBER:	NDA01/DMR01/25-26	CLOSING DATE:	04 SEPTEMBER 2025	CLOSING TIME:	12:00
DESCRIPTION	APPOINTMENT OF A SERVICE PROVIDER FOR LONGITUDAL REASEARCH ON POLICY IMPEDIMENTS AFFECTING CSO's OVER A THREE-YEAR PERIOD (2025-2028).				
BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)					
NATIONAL DEVELOPMENT AGENCY (NDA) HEAD OFFICE					
26 WELLINGTON ROAD, PARKTOWN					
JOHANNESBURG					
2193					
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO			TECHNICAL ENQUIRIES MAY BE DIRECTED TO:		
CONTACT PERSON	NOMVULA MOLOI		CONTACT PERSON	DR NTHABISENG KRAAI	
TELEPHONE NUMBER	011 018 5562		TELEPHONE NUMBER	011 018 5507	
FACSIMILE NUMBER	N/A		FACSIMILE NUMBER	N/A	
E-MAIL ADDRESS	NomvulaM@nda.org.za		E-MAIL ADDRESS	NthabisengK@nda.org.za	
SUPPLIER INFORMATION					
NAME OF BIDDER					
POSTAL ADDRESS					
STREET ADDRESS					
TELEPHONE NUMBER	CODE		NUMBER		
CELLPHONE NUMBER					
FACSIMILE NUMBER	CODE		NUMBER		
E-MAIL ADDRESS					
VAT REGISTRATION NUMBER					
SUPPLIER COMPLIANCE STATUS	TAX COMPLIANCE SYSTEM PIN:		OR	CENTRAL SUPPLIER DATABASE No:	MAAA
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES OFFERED?	<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]		ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS					
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?				<input type="checkbox"/> YES <input type="checkbox"/> NO	
DOES THE ENTITY HAVE A BRANCH IN THE RSA?				<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	
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.					

PART B

TERMS AND CONDITIONS FOR BIDDING

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.
1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).
2. TAX COMPLIANCE REQUIREMENTS
2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

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

DATE:



PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER:	BID NO : NDA01/DMR01/25-26
CLOSING TIME : 12H00	CLOSING DATE... 04 SEPTEMBER 2025

OFFER TO BE VALID FOR ...**150**.....DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)	
1.	The accompanying information must be used for the formulation of proposals.		
2.	Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.	R.....	
3.	PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)		
4.	PERSON AND POSITION	HOURLY RATE	DAILY RATE
	.....	R-----	-----
	.....	R-----	-----
	.....	R-----	-----
	.....	R-----	-----
	.....	R-----	-----
5.	PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT		
	.....	R-----	----- days
	.....	R-----	----- days
	.....	R-----	----- days
	.....	R-----	----- days
5.1	Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.		
	DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY AMOUNT
	.....	.....	R.....
	.....	.....	R.....
	.....	.....	R.....

Name of Bidder:

..... R.....

TOTAL: R.....

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

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....

TOTAL: R.....

6. Period required for commencement with project after acceptance of bid
 7. Estimated man-days for completion of project
 8. Are the rates quoted firm for the full period of contract? *YES/NO
 9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

*[DELETE IF NOT APPLICABLE]

Any enquiries regarding bidding procedures may be directed to the –

Nomvula Moloi
 Tel:011 018 5562
 NomvulaM@nda.org.za

Or for technical information –

Dr. Nthabiseng Kraai
 Tel:011 018 5507
 NthabisengK@nda.org.za



SBD4

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise, employed by the state? **YES/NO**

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

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.



SBD4

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;



SBD4

- 3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4 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.
- 3.5 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.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS

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



SBD4

1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder



SBD 6.1

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

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

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

1. GENERAL CONDITIONS

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

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

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

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

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

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

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	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 contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

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

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

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

$$Ps = 80 \left(1 + \frac{Pt - P_{max}}{P_{max}}\right) \text{ or } Ps = 90 \left(1 + \frac{Pt - P_{max}}{P_{max}}\right)$$

Where

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

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Enterprises owned by black people (% shareholding by black people will determine the points)		10		
Enterprises located in specific rural/underdeveloped /townships (<i>within South Africa</i>). <i>NB: A certified proof of address (municipal rates/stamped letter from a councillor) must be attached to claim points. The NDA will verify location using CSD report</i>		04		
Enterprises owned by black African youth (% shareholding by black people will determine the points)		04		
Enterprises owned by black African women (% shareholding by black people will determine the points)		02		

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

☐ Partnership/Joint Venture / Consortium

☐ One-person business/sole propriety

☐ Close corporation

☐ Public Company

☐ Personal Liability Company

☐ (Pty) Limited

☐ Non-Profit Company

☐ State Owned Company

[TICK APPLICABLE BOX]

- 4.6. 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 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:	.....

