small business development
Department: Small Business Development
REPUBLIC OF SOUTH AFRICA

REQUEST FOR QUOTATION

Reference No:	

You are hereby requested to submit a quotation in respect of goods and services as per **Annexure A**, and/or attached Specification/Terms of Reference.

SUPPLIER DETAILS	
Name of supplier	
Contact person	
Fax number	
Contact number	

	BUSINESS CLASSIFICATION				
Turn over(TICK appropriate box below) **Please note that this information is compulsory and must therefore be provided. If uncertain use the attached schedule for guidance**					
Exempted Micro-Enterprises (EMEs) R0.00 to R10m				Qualifying Small Enterprises (QSE)	Large Company
Small	Micro	Medium	Cooperative	>R10m <R50m	>R50 million

ENQUIRIES AND SUBMISSION DETAILS	
Contact person	Nhlakanipho Msane
e-mail address	DSBDExternalRFQ@dsbd.gov.za
Telephone number	060 981 0616
Issue/Request date	28 NOVEMBER 2025
Closing date and time	03 DECEMBER 2025 @ 12H00

Terms and Conditions

#	REQUIREMENTS	COMMENTS
1	Quotations should be dated.	
2	Quotations should be valid for 30 days unless indicated otherwise.	
3	Does it comply with cost containment (Yes or No)	
3	All prices quoted must be VAT inclusive, if no indication is indicated prices will be evaluated as inclusive.	
4	Should you not be registered for VAT it should be clearly indicated on the quotation.	
5	Please indicate the delivery period and confirm whether the delivery period is firm.	
6	Please indicate whether the prices quoted are firm for the duration of the validity period of the quotation.	
7	Please indicate whether the quotation is strictly to specification and if not state deviations and reasons for deviating from the requested specifications.	
8	This quotation is subject to the **Department of Small Business Development's** general conditions of contract unless otherwise stated by the supplier.	
9	Quotations should be on the service provider's letter head.	
10	**Failure to submit quotation on the closing date and time with all supporting documents MAY invalidate you quotation**	

Definition of small enterprise/business in South Africa: means "a separate and distinct business entity, together with its branches or subsidiaries, if any, including co-operative enterprises and non-governmental organisations, managed by one owner or more predominantly carried on in any sector or subsector of the economy mentioned in the schedule and classified a micro, a very small, a small or medium enterprise by satisfying the criteria mentioned in in column 3, 4 and 5 of the schedule"

Please note: ***Quotations with an amount value of R2 000.00 and above but not exceeding R999 999.99 80/20 preference point system shall be applied where 80 points will be allocated towards price and 20 points allocated towards specific goals, Size of Enterprise, Spatial (rural/ Township/ City) and Youth.***

ANNEXURE A

REQUIREMENTS LIST

Item No	No of units	Item description	Value per item
1	1	THE DEPARTMENT OF SMALL BUSINESS DEVELOPMENT (DSBD) REQUEST FOR PROPOSALS FROM EXPERIENCED SERVICE PROVIDERS TO CONDUCT AN IMPLEMENTATION AND OUTCOME EVALUATION OF THE SHARED ECONOMIC INFRASTRUCTURE FACILITY PROGRAMME	
Compulsory documents to be returned.		**(a) Fully completed Standard Bidding Documents; SBD 4 and 6.1** **(b) Points for tender shall be awarded for Price and B-BBEE, SMMEs, Spatial (rural/ Township/ City) and Youth.** **To claim points following should be provided.** **i. For B-BBEE require a Certified copy of BEE Certificate/or Affidavit,** **ii. A Confirmation of SMMEs, take note of the above table (business classification)** **iii. For Spatial (Rural/ Township/ City) a Certified copy of your proof of residence 6 months**	

SCHEDULE 1

The new National Small Enterprise Act thresholds for defining enterprise size classes by sector, using two proxies

Column 1	Column 2	Column 3	Column 4
Sectors or sub-sectors in accordance with the Standard Industrial	**Size or class of enterprise**	**Total full-time equivalent of paid employees**	**Total annual turnover**
Agriculture	Medium	51 - 250	≤ 35,0 million
	Small	11- 50	≤ 17,0 million
	Micro	0 – 10	≤ 7,0 million

Definition of small enterprise/business in South Africa: means "a separate and distinct business entity, together with its branches or subsidiaries, if any, including co-operative enterprises and non-governmental organisations, managed by one owner or more predominantly carried on in any sector or subsector of the economy mentioned in the schedule and classified a micro, a very small, a small or medium enterprise by satisfying the criteria mentioned in in column 3, 4 and 5 of the schedule"

Mining and Quarrying	Medium	51 - 250	≤ 210,0 million
	Small	11- 50	≤ 50,0 million
	Micro	0 – 10	≤ 15,0 million
Manufacturing	Medium	51 - 250	≤ 170,0 million
	Small	11- 50	≤ 50,0 million
	Micro	0 – 10	≤ 10,0 million
Electricity, Gas and Water	Medium	51 - 250	≤ 180,0 million
	Small	11- 50	≤ 60,0 million
	Micro	0- 10	≤ 10,0 million
Construction	Medium	51 - 250	≤ 170,0 million
	Small	11- 50	≤ 75,0 million
	Micro	0- 10	≤ 10,0 million
Retail, motor trade and repair services.	Medium	51 - 250	≤ 80,0 million
	Small	11- 50	≤ 25,0 million
	Micro	0 – 10	≤ 7,5 million
Wholesale	Medium	51 - 250	≤ 220,0 million
	Small	11- 50	≤ 80,0 million
	Micro	0 – 10	≤ 20,0 million
Catering, Accommodation and other Trade	Medium	51 - 250	≤ 40,0 million
	Small	11- 50	≤ 15,0 million
	Micro	0 – 10	≤ 5,0 million
Transport, Storage and Communications	Medium	51 - 250	≤ 140,0 million
	Small	11- 50	≤ 45,0 million
	Micro	0 – 10	≤ 7,5 million
Finance and Business Services	Medium	51 - 250	≤ 85,0 million
	Small	11- 50	≤ 35,0 million
	Micro	0- 10	≤ 7,5 million
Community, Social and Personal Services	Medium	51 - 250	≤ 70,0 million
	Small	11- 50	≤ 22,0 million
	Micro	0 – 10	≤ 5,0 million

Definition of small enterprise/business in South Africa: means “a separate and distinct business entity, together with its branches or subsidiaries, if any, including co-operative enterprises and non-governmental organisations, managed by one owner or more predominantly carried on in any sector or subsector of the economy mentioned in the schedule and classified a micro, a very small, a small or medium enterprise by satisfying the criteria mentioned in in column 3, 4 and 5 of the schedule”

small business development
Department:
Small Business Development
REPUBLIC OF SOUTH AFRICA

THE DEPARTMENT OF SMALL BUSINESS DEVELOPMENT (DSBD) REQUEST FOR PROPOSALS FROM EXPERIENCED SERVICE PROVIDERS TO CONDUCT AN IMPLEMENTATION AND OUTCOME EVALUATION OF THE SHARED ECONOMIC INFRASTRUCTURE FACILITY PROGRAMME

Date issued	**:**	28 November 2025
Closing date and time	**:**	3 December 2025 @ 12H00
Request Validity Period	**:**	**90 days**

Submission of proposals: Supply Chain Management

dsbdtenders@dsbd.gov.za

1. BACKGROUND AND RATIONALE

The Department of Small Business Development developed the Shared Economic Infrastructure Facility (SEIF) Programme which is implemented under the National Informal Business Upliftment Strategy (NIBUS) and guided by the SEIF Guideline. The SEIF Programme is one of the support measures to encourage partnerships between national, provincial and local government to accelerate public and private sector investment through a provision of necessary economic infrastructure for small enterprises to unlock greater economic–benefits. Public and private sector applicants are invited to apply for the SEIF Programme on offer in the manner outlined in the SEIF guidelines1.

The objective of the SEIF Programme is to support small enterprises with an intention to improve access, create local economic benefits and optimise the performance of businesses operating in those facilities. This is in line with government's priorities to improve and modernise infrastructure that enables small businesses and co-operatives to grow and become profitable. This will be implemented through encouraging public and private sector partnerships (PPP) for the establishment and/or improvement of the shared-economic (business) infrastructure for use by small enterprises.

The programme is aimed at assisting small enterprises (including informal, micro, small and medium businesses as well as co-operatives) in improving their competitiveness and sustainability, to become integrated into the main economy. Business Infrastructure Support (BIS) responds to the ecosystem identified Infrastructural needs through product markets, containers, MSME industrial hub etc. for potential, informal and operational entrepreneurs as articulated in the National Informal Business Upliftment Strategy (NIBUS); Integrated Strategy on the Promotion of Entrepreneurship and Small Enterprises (ISPESE); Cooperative Development Strategy.

The intention of the SEIF Programme is to leverage public and private sector investment that would provide necessary infrastructure by creating an enabling environment for businesses to operate their businesses mostly in townships, rural areas and in the inner city where there is clear business activity taking place. The program also covers the following:

- Construction of new buildings
- Refurbishment

[1] *Shared Economic Infrastructure Facility Guideline*

- Containers and
- Shared Equipment

1.1. The unit of Analysis: Shared Economic Infrastructure Facility (SEIF) Programme

The Shared Economic Infrastructure Facility (SEIF) Programme was developed in 2014 with the following key objectives:

- To promote inclusive economic participation
- To leverage Public and Private Partnership
- Facilitate MSME's competitiveness and growth
- Revitalise township and rural economies
- To promote sustainable infrastructure development
- To support sector specific infrastructure needs
- To create jobs and local economic opportunities and
- Enhance market access for MSME's

2. PURPOSE OF EVALUATION

The purpose of this evaluation is to assess the effectiveness and efficiency of the SEIF Programme delivery, and the extent to which it has achieved its intended results. This includes examining the quality of delivery, stakeholder engagement, and resource utilisation between the period 2019 and 2024. Furthermore, the evaluation should assess the extent to which the intended outcomes have been achieved and provide practical, evidence-based recommendations to enhance the effectiveness of the programme.

3. THE FOCUS OF EVALUATION WHICH THE DSBD INTENDS TO COVER IN THE EVALUATION

The OECD evaluation criteria come from the OECD DAC (Development Assistance Committee). The OECD evaluation criteria including relevance, coherence, effectiveness, efficiency, and sustainability serve as the foundation for assessing whether an intervention is appropriate, strategically aligned, achieving its intended objectives, cost-effective, generating meaningful change, and likely to deliver lasting benefits. Accordingly, the evaluation will adopt these criteria and integrate them into the proposed key evaluation approach and questions outlined below:

Relevance (design)

3.1 To what extent is the SEIF Programme implemented as designed and what can be done to improve? (Are all the necessary feasibility studies (technical, environmental, financial) conducted and completed)?

Coherence

3.2 Is the SEIF Programme aligned with national, provincial and local policy priorities?

3.3 To what extent does the SEIF Programme complement or duplicate other existing programmes or services?

3.4 Are partnerships and collaborations logically integrated into the SEIF Programme?

Effectiveness (implementation)

3.5 To what extent are the objectives of the SEIF Programme achieved? (Has the programme contributed to job creation and market access for supported MSME's)

3.6 To what extent has the SEIF Programme contributed to improved performance, and growth of supported small enterprises and shared facilities?

3.7 To what extent have SEIF programme's interventions contributed to promoting gender equality that benefits women, men and other vulnerable groups?

3.8 Have different population groups (who) or geographic locations (where) been able to participate in the programme appropriately and fairly?

3.9 Whose interests are prioritised, and whose are neglected? What mitigations are in place to counter inequities?

Efficiency (implementation)

3.10 To what extent are resources optimally utilised to effectively achieve the objectives of the SEIF Programme? (to further assess financial viabilities and Institutional capacity (e.g., Co-funding/ Cost - sharing from applicant or other funders on the project, applicant to have technical capacity in managing projects, governance, financial)

Point of Emphasis

Please note that the above questions constitute the Key Evaluation Questions (KEQs) proposed for this evaluation. The appointed service provider will be required to develop detailed sub-questions aligned to these KEQs, to comprehensively address the purpose and objectives of the evaluation.

4. INTENDED USERS AND STAKEHOLDERS OF THE EVALUATION

1. DSBD	• Inform Policy and Strategic Planning • Improve Programme Design and Implementation • Develop an Improvement Plan • Strengthening Monitoring and Accountability • Support Resource Allocation and Decision-Making • Enhance Stakeholder Engagement and Learning
2. Provincial government **3. Local government and their entities**	• To enhance the planning, coordination, and implementation of support services for small enterprises and shared facilities within their jurisdictions • To align their local economic development strategies with proven models and best practices identified through the programme. • Inform region-specific interventions, ensuring that support is tailored to the unique needs of local enterprises, including those in under-resourced or rural areas. • Support improved oversight, accountability, and collaboration between government tiers, while offering guidance on how to replicate or scale effective shared facility models. • Strengthen the role of provincial and local governments in fostering inclusive, sustainable small enterprise ecosystems.
4. Government entities (SEDFA)	• strengthen its role as an implementing partner and improve the operational effectiveness of its support to small enterprises and shared facilities. • The evaluation will provide SEDFA with evidence-based insights into the performance of the programme, highlighting what is working well and where adjustments are needed. This will enable SEDFA to refine its implementation approaches, improve coordination with stakeholders, and enhance service delivery to beneficiaries. • Inform internal learning and capacity building, supporting the development of more responsive and efficient processes. • The evaluation will guide SEDFA in identifying opportunities for innovation, scaling successful models, and contributing to the broader policy dialogue on enterprise development. Ultimately, it will position SEDFA to deliver greater impact and value within the

	SEIF Programme and beyond.
5. Private sector	• To identify strategic opportunities for collaboration, investment, and support for small enterprises and shared facilities. • The evaluation will provide insights into the effectiveness and impact of the programme, highlighting successful models and areas where private sector involvement could enhance sustainability and scale. • Businesses, industry associations, and investors may use the findings to better understand the needs and challenges of small enterprises, identify gaps in value chains, and explore potential markets or partnerships. • Inform corporate social responsibility (CSR) initiatives and inclusive business strategies that align with enterprise development goals.
6. Parliament	• To fulfil its oversight, accountability, and legislative functions more effectively. The evaluation will provide Parliament with evidence-based insights into the performance, impact, and value-for-money of the programme, enabling Members of Parliament to assess whether the initiative is meeting its intended objectives and serving the needs of small enterprises and communities. To guide recommendations for legislative improvements, resource allocation, and the strengthening of institutional frameworks that support enterprise growth. • Hold implementing departments and agencies accountable while advocating for responsive, inclusive, and results-driven support for the small business sector.

5. SCOPE OF THE EVALUATION

5.1. The period under review covers the assessment of the implementation of the SEIF Programme over a five-year span, from 2019 to 2024.

5.2. The service provider is required to demonstrate a clear understanding of how the SEIF Programme is implemented across provinces and municipalities with highest number of recipients, including the roles of relevant provincial and municipal institutions. The evaluation should assess the extent to which the key components of the programme were executed during the review period, in alignment with the SEIF Guidelines and the programme's theory of change. To achieve this, a thorough analysis of existing monitoring data (includingassessment reports) and key performance information must be conducted. This analysis should be validated through primary data collection to ensure accuracy and comprehensiveness.

5.3. Within the scope:

As previously stated, the evaluation is anchored on the core objectives of the SEIF Programme as outlined in section 1.1.

5.4. Outside the scope:

The Informal and Micro Enterprise Development Programme (IMEDP) is explicitly excluded from the scope of this evaluation and, as such, will not be assessed or included in any component of the evaluation process. This ensures that the evaluation remains focused solely on the SEIF Programme and its related interventions, without incorporating activities, outcomes, or documentation pertaining to the IMEDP.

The service provider must consider and reference the following key programme documents, which are integral of the SEIF Programme:

- National Small Enterprise Amendment Act 21 of 2024
- National Informal Business Upliftment Strategy (NIBUS)
- Shared Economic Infrastructure Facility Guidelines

5.5. Geographic coverage: The SEIF Programme is a national intervention which seeks to leverage public and private sector investment that would provide necessary infrastructure by creating an enabling environment for businesses to operate their businesses mostly in townships, rural areas and in the inner city where there is clear business activity taking place. Its implementation spans across all spheres of government, provinces, municipalities, and districts to ensure a coordinated and inclusive delivery of the SEIF Programme at multiple administrative levels.

5.6. The programme is aimed at assisting small enterprises (including informal, micro, small and medium businesses as well as co-operatives) in improving their competitiveness and sustainability, to become integrated into the main economy.

5.7. The evaluation will target a nationally representative sample of small enterprises and shared facilities within the scope of the SEIF Programme. The sample will be disaggregated by province, sector, and demographic groups specifically women, youth, and persons with disabilities, based on available datasets. The appointed service provider is required toallocate a minimum of 25% of the total project budget to fieldwork, including site visits to small enterprises and shared facilities that may not be responsive to online survey methods. For other stakeholders, such as implementing agencies and programme or strategy managers, virtual platforms may be utilised for data collection and/or validation purposes.

5.8. Limitations to the scope of the evaluation: Although the SEIF Programme outlines eight core objectives, there are notable limitations concerning the availability and accessibility of data and programme records. These limitations are related to the extent to which the following specific programme data and records are available:

- Pilot phase (2014- 2018)
- Programme training conducted
- Programme awareness conducted
- Qualifying SMMEs, Informal business and Cooperatives assisted in acquiring funding
- SMMEs, Informal business and Co-operatives acquired business information.
- Market linkages conducted

6. EVALUATION APPROACH AND METHODOLOGY

The relevant evaluation methods should be proposed to respond to the key evaluation questions. The evaluation will apply mixed methods of data collection and both quantitative and qualitative data will be used consisting of the review of Programme documents, review of literature, case studies (3 facilities), existing data sets, as well as interviews/ focus groups with key stakeholders. A participatory approach with all key stakeholders should be applied to ensure a collaborative process in which all relevant parties such as government departments, implementing agencies, beneficiaries, and other partners who are actively involved in the design, planning, implementation, monitoring, and evaluation of the SEIF Programme.

The service provider is required to develop a clear and robust stakeholder selection criterion, which includes identifying relevant stakeholders such as supported small enterprises and shared facilities, to be sampled for the purpose of measuring results. This process should be guided by and aligned with the SEIF Programme's Theory of Change, which must also be referenced recognising that a Theory-Based Evaluation (TBE) is the proposed evaluation approach for the study. The methodology will incorporate site visits to selected small enterprises and shared facilities that have received support. A representative sample of these entities will be identified and scoped as part of theevaluation process.

6.1 GENDER RESPONSIVE EVALUATION

In line with the Department of Planning, Monitoring and Evaluation's (DPME) Gender Responsive Guideline 2021[2], National Evaluation Policy Framework (NEPF) 2019[3] and Gender-Responsive Planning, Budgeting, Monitoring, Evaluation and Auditing Framework (GRPBMEA) 2019[4], the Shared Economic Infrastructure Facility (SEIF) Programme evaluation will adopt a Gender-Responsive Evaluation (GRE) approach as a core principle to ensure that the programme is assessed through a gender-equity lens.

Given South Africa's historical, socio-economic, and cultural context, this approach will examine the differential impacts of SEIF-funded infrastructure on women, men, and gender-diverse entrepreneurs, particularly those operating in townships and rural areas. By collecting and analysing gender-disaggregated data and engaging with marginalised voices, including women entrepreneurs, cooperatives, and youth, the evaluation will uncover structural barriers that limit equitable access to shared facilities, co-funding opportunities, and participation in decision-making processes.

Applying GRE to SEIF aligns with the government's commitments to gender equality as outlined in Chapter 5 of the National Development Plan (NDP 2030)9 and the Promotion of Equality and Prevention of Unfair Discrimination Act (Act No. 4 of 2000). Insights from this analysis will help identify whether SEIF infrastructure projects contribute to reducing gender disparities in enterprise development, improving women-owned business participation, and creating more inclusive economic spaces. The findings will guide future programme adjustments to ensure that SEIF continues to deliver infrastructure that is not only economically enabling but also socially equitable, thereby strengthening local economic development outcomes.

6.2 METHODOLOGICAL FRAMEWORK

The evaluation methodology must include, amongst others, the following:

Document Review and literature review

For the evaluation if the SEIF Programme, a literature review will be employed as a systematic analysis of existing academic research to understand current knowledge and identify gaps within the programme[5], while a document review will be aimed at analysing non-academic or organisational

[2] DPME (2021) Gender Responsive Guideline
[3] National Evaluation Policy Framework (2019)
[4] Gender-Responsive Planning, Budgeting, Monitoring, Evaluation and Auditing Framework (2019)
[5] Booth, A., Sutton, A., & Papaioannou, D. (2016). *Systematic Approaches to a Successful Literature Review* (2nd ed.).

documents to extract relevant information for qualitative research[6]. The service provider is expected to conduct a comprehensive review of all relevant legislative, policy, and strategic documents pertaining to the government's economic objectives for the period under review. This analysis should identify linkages, overlaps, and gaps, with the aim of informing recommendations to enhance the implementation and alignment of the SEIF Programme going forward.

Furthermore, the service provider is expected to conduct a review of international research on the implementation of comparable programmes. This review should highlight key characteristics and contextual factors that commonly influence programme effectiveness[7]. Additionally, any previous evaluations, assessments, or reviews relevant to the SEIF Programme must be analysed. Insights gained from this exercise should guide the refinement of the current SEIF Programme's Theory of Change and inform the development of appropriate data collection instruments.

Refinement of the Theory Change and Logical Framework of the SEIF Programme

A Theory of Change (ToC) and a Logical Framework (Log frame) for the SEIF programme have been developed and are both planning and monitoring tools used in programme management [8]. The service provider is expected to reference, assess and refine the existing ToC and the (Log Frame) of the SEIF Programme. A final version of the ToC and Log Frame must be submitted at the conclusion of the evaluation. This ToC and Log Frame will serve as a guiding document for the programme's implementation and monitoring. All recommendations provided should be specific, actionable, and grounded in practical considerations, as they will inform the development of an improvement plan following the evaluation.

Case studies on shared facilities

The service provider is also expected to conduct case studies of three shared facilities to gain a comprehensive and contextual understanding of how and why these facilities operate effectively within their specific environments[9]. In this regard, it is essential that the service provider produces a clear and well-defined set of selection criteria, along with a detailed justification for the choice of the shared facilities to be included in the evaluation. The rationale should demonstrate how the selected facilities are representative of the broader programme context, and how they align with the objectives of the assessment to ensure relevance, diversity, and the potential to generate meaningful insights. These case studies aim to uncover the complexities and nuances that influence the success

[6] Owen,G.A.(2009).*Document Analysis as a Qualitative Research Method*, *Qualitative Research Journal*, 9(2), 27 40.
[7] Creswell, J.W. (2014). *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches* (4th ed.).
[8] Weiss, C. H. (1995). *Nothing as Practical as Good Theory: Exploring Theory-Based Evaluation for Comprehensive Community Initiatives.*
[9] *Davey, G. (2020). Case study research. SAGE Publications.*

or failure of certain small enterprises and shared facilities. Through these in-depth assessments, the evaluation will provide valuable insights for learning and reflection, allowing stakeholders to identify key lessons, challenges, and areas for improvement. Within the broader SEIF Programme evaluation, the case studies will contribute to evidence-based recommendations and help assess the potential for scaling or replicating successful shared facility models.

Meetings and interviews of key stakeholders

The service provider is expected to conduct interviews with key stakeholders, including programme managers at DSBD, as well as other individuals critical to the implementation of the SEIF Programme under its institutional arrangements. In addition, a survey must be administered both online and in person, targeting all sampled small enterprises and shared facilities. This mixed-methods approach ensures robust stakeholder engagement and comprehensive data collection, enabling a nuanced understanding of the programme's effectiveness and identifying areas for improvement.

Quantitative and Qualitative Analysis

A variety of data collection methods should be employed to enable a mixed-methods approach that effectively addresses the Key Evaluation Questions (KEQs). The chosen sampling methods must be clearly justified to ensure the selection of a representative sample, using standard techniques aligned with the logic and design of the evaluation framework. Data and information should be collected and presented at multiple levels (national, provincial, municipal and district) to provide a well-rounded perspective. The evaluation process must also account for cross-cutting issues, including gender, women, youth, and persons with disabilities. Accordingly, data should be disaggregated to reflect strategic equity considerations, such as programme uptake and trends impacting these groups, thereby ensuring a comprehensive and inclusive assessment

Sampling framework

The evaluation will employ a stratified purposive sampling approach to ensure representation across key variables relevant to the Shared Economic Infrastructure Facility (SEIF) Programme. The sample will be stratified by province, economic sector, gender, and stage of enterprise development to capture the diversity of beneficiaries and geographic spread of the programme. Particular emphasis will be placed on the targeted inclusion of vulnerable groups, specifically women, youth, and persons with disabilities, to assess the programme's inclusivity and equitable access to support. The SEIF population size of beneficiaries is 4423 countrywide and thus a scientific sample should be determined to ensure representation and generalisation of findings.

Point of Emphasis

Data limitations should be addressed through the use of mixed methods approaches wherever possible, to strengthen the validity and reliability of the evaluation findings. This can be done by combining quantitative and qualitative techniques to help compensate for gaps by providing both breadth and depth of insights. Additionally, triangulating data from multiple sources is key to enhance reliability, while proxy indicators can be used when direct data is unavailable. Where limitations cannot be fully mitigated, they must be clearly acknowledged and documented as part of the overall evaluation design. Additionally, all underlying assumptions and any trade-offs made during the evaluation process should be explicitly stated and agreed upon with key stakeholders to ensure transparency and shared understanding.

7. EVALUATION PLAN

The core products expected from the evaluation are the following:

7.1 Revised Inception report by the service provider as a follow-up to the proposal with a revised evaluation plan, overall evaluation design, approach and methodology. This forms the basis for initial agreements and expectations in the evaluation.

7.2 The Literature and Document Review and Analysis Report of the SEIF Programme systematically examine key sources to provide context, assess policy alignment, and inform the evaluation framework. This should include reviewing national development plans, MSME policies, and DSBD strategies to ensure alignment with broader government priorities; analysing programme design documents such as the National Informal Business Upliftment Strategy (NIBUS), SEIF Guideline; and examining monitoring and evaluation reports, financial records, and operational data to measure the programme' s performance, effectiveness, efficiency, coherence and sustainability.

7.3 Case Study Report of three shared facilities to gain a comprehensive and contextual understanding of how and why these facilities operate effectively within their specific environments. The shared facilities chosen will be decided based on significant similarities to the South African market or based on the preferences of the Steering Committee.

7.4 Evaluation framework including report structure, detailed methodology, content structure for the final report final data collection instruments and other tools designed to measure how the Theory of Change is working.

7.5 One-day virtual workshop to discuss the report structure, evaluation matrix, analytical framework, final data collection instruments and other tools.

7.6 A Theory of Change (ToC) virtual workshop with stakeholders to discuss, assess and refine a theory of change for the SEIF Programme to guide the evaluation. An in-person or virtual Theory of Change (ToC) workshop is a critical component of the evaluation process to foster collaborative engagements among key stakeholders, including programme managers, implementers, and beneficiaries. This setting allows for real-time dialogue, clarification of assumptions, and consensus-building around the programme's intended outcomes, causal pathways, and contextual factors. The workshop will help surface implicit theories, align perspectives, and validate or refine the existing ToC based on practical experiences and insights. Ultimately, it will strengthen the rigour and relevance of the evaluation framework, ensuring that the evaluation is grounded in a shared understanding of the programme logic.

7.7 Fieldwork/ data collection progress reports.

7.8 Draft evaluation report for review, full and in 1/5/25 format (note: there may be 2 versions after comments).

7.9 A stakeholder validation workshop to discuss the draft report; (note: this may be held to discuss initial findings and recommendations before the 2nd version draft report is produced).

7.10 The final evaluation report, both full and in 1/5/25 format, in hard copy and electronic.

7.11 A closed-out workshop to receive the final evaluation report

7.12 Provision of all datasets, metadata and survey documentation (including interviews) when data is collected. This will remain the property of DSBD.

7.13 A PowerPoint or audio-visual presentation of the results and other presentations as required.

8. MILESTONES

The duration of the evaluation is planned for four (4) months, commencing in December 2025 and concluding by early March 2026. The appointed team will be required to develop a detailed project plan outlining key milestones aligned with the deliverables specified in Table 2 below.

Table 2: Outline project plan and payment schedule

Deliverables	Expected milestones	% Payment
Sign Service Level Agreement (SLA)[10]		
Case Study Report	Dec 2025	

[10] *The service provider is required to note that no work will commence before the signing of the SLA and subsequent issuing of the Purchase Order (PO).*

Deliverables	Expected milestones	% Payment
Submission of draft data collection instruments, report structure, analysis plan and other tools to test out how the theory of change is working		25%
One-day virtual workshop to validate the overarching Theory of Change		
Approval of final data collection instruments, report structure, analysis plan and other tools		
Revised literature review and document analysis (1st draft evaluation report)		
Fieldwork data collection progress reports	Jan-Feb 2026	30%
2nd draft evaluation report for review. This includes proposed changes to the intervention design.		
Validation workshop with relevant stakeholders to discuss the draft report	March 2026	
Revised Draft evaluation report full and 1/5/25 summaries	March 2026	
Consolidated comments/ inputs from the evaluation steering committee	March 2026	
Final Evaluation Report, Version 1 Submitted	March 2026	20%
Comments/ inputs from the evaluation steering committee on Final Report	March 2026	
Final report draft, version 2 Submitted	March 2026	
Approval of the Report by the Steering Committee		
Close-Out Report	March 2026	25%
PowerPoint Presentation of the Report at DSBD top management (EXCO) and provision of all datasets, metadata and survey documentation (including interview transcripts).		

8.1 Pricing requirements

Payment will be made in accordance with the payment schedule outlined above. The service provider is required to submit an all-inclusive cost for the project. This should include a breakdown of daily rates along with the anticipated number of days per team member or expert. Additionally, all expected travel costs and disbursements must be clearly itemised and incorporated into the total project cost.

The project will be awarded based on the total cost for the entire project duration, rather than on hourly or daily rates. The service provider must ensure the successful delivery of all project deliverables and outcomes within the timeframe specified in this Terms of Reference.

Point of Emphasis

All prices must be inclusive of VAT. Any proposed price escalations, along with the conditions under which they would apply, must be clearly stated. No variation of the contract price or scope creep will be permitted. Price proposals must be fully comprehensive and inclusive of all costs required to deliver the outputs specified in this Terms of Reference.

9. EVALUATION TEAM

The service provider must specify the number of evaluators proposed for the project team, clearly outlining each member's area of expertise and their respective roles and responsibilities. The team must include an evaluation specialist with proven experience in conducting similar evaluations. This individual should possess relevant qualifications, with a master's degree or higher in a related field strongly preferred.

The table below provides an overview of the proposed qualified team:

Team roles and responsibilities Role(s)	Requirements	Responsibilities
EvaluationSpecialist	Must have five years' experience in evaluation and independently led three government evaluations in which one is implementation and or outcome evaluation. Minimum: An Honours qualification in M&E Advantage: A Master s qualification in M&E.	Bring specialist knowledge in the implementation and outcome evaluation methodology.
	Technical Experience: Experience with qualitative and quantitative research methods.	

Team roles and responsibilities Role(s)	Requirements	Responsibilities
	Experience in statistical analysis and handling large datasets using software like SPSS	
	Experience in qualitative analysis Atlas.ti, NVivo, MAXQDA or other Qualitative Data Analysis Software,	
	Experience in data visualisation tools (e.g., Tableau, Power BI or advanced Excel).	
Infrastructure Development Specialist	Master's degree in civil engineering or a specialised field (e.g., structural, transportation, environmental engineering). Must have ten years' experience in building and infrastructure development. Proof of professional body association is a MUST	With extensive experience in the management and execution of construction projects. Coupled with knowledge and experience in planning and development of infrastructure systems like roads, bridges, water supply, and sewage. Bring knowledge of management costs and contracts related to building and infrastructure projects
Micro, Small and Medium Enterprises MSMEs Sector Specialist	Must have ten years' experience in MSMEs Sector have designed or implemented three MSMEs interventions, a relevant Postgraduate in Entrepreneurship development and or Development studies majoring in economics	Bring in-depth knowledge and understanding of enterprise development in particular with regard to MSMEs development and support or implementation support and be able to bring this insight to ensure that the richness of the programme is explored, and meaningful recommendations are derived. Understand the relevant sector/intervention and government systems in relation to the evaluation and can appropriately relate the evaluation to

Team roles and responsibilities Role(s)	Requirements	Responsibilities
		current political, policy and governance environments.

,

10. GOVERNANCE ARRANGEMENTS FOR THE EVALUATION.

10.1 Role of steering committee

An Evaluation Steering Committee (ESC) has been established, comprising representatives from the DSBD, relevant government agencies, and other key stakeholders. The ESC will be responsible for overseeing the entire evaluation process, including the review and approval of the inception report and other critical deliverables. Its role is to ensure that the evaluation is conducted with integrity, relevance, and alignment to the objectives of the SEIF Programme.

10.2 Reporting Arrangements

The evaluation project manager, to whom the service provider will report on all matters related to the evaluation process and commissioning, is Ms. Patricia Langa, Director: Sector-Wide Monitoring and Evaluation. She can be contacted via email at PLanga@dsbd.gov.za or by telephone at 066 110 9877.

11. STRUCTURE AND CONTENTS OF PROPOSAL TO BE SUBMITTED

11.1 Structure and contents of the proposal

The structure and contents of a proposal required from the service provider are shown in Box 1 below.

Box 1. Structure of a proposal

- The proposal must provide the following details as outlined below. Failure to provide this will lead to disqualification.
- Approach, design, and methodology for the evaluation (e.g., literature and documentation review, data collection, tools, sample, suggestions for elaboration or changes to scope and methodology as outlined in the TORs, examples of evaluation questions suggested, process elements)
- Activity-based evaluation plans (including effort for different team member/s per activity and time frame linked to activities it is particularly important that effort levels for key national and international resources are clear)
- Detailed activity-based budgets (in South African Rand, including VAT what about disbursement)
- Competence (must include a list of related projects undertaken (independently managed/led) by the main contractor and subcontractors, making clear who did what, when. This must include (2) two

contactable references for the evaluations presented as Evidence of previous bid in similar projects and submitted.

- Team (team members, roles, and level of effort for each member of the team)
- Capacity building plan (skills transfer) for emerging evaluators within DSBD
- Quality assurance plan (to ensure that the process and products are of good quality)
- Attachments
- MUST: Examples of reports of two evaluations (design, and/ or implementation and/ or Outcomes) taken in accordance with the national evaluation systems
- Letters from departments or organisations with a reference for work undertaken indicating the work carried out, date, value and whether the work was satisfactory. This should include contact details for follow-up.
- CVs of key personnel.
- Completed supply chain forms attached herewith (including updated tax clearance).

12. INFORMATION FOR SERVICE PROVIDERS

The proposal must be submitted with electronic and 4 hard copies.

13. EVALUATION OF PROPOSALS

13.1. Phase 1: Administrative compliance

The Supply Chain Management will carry out a preliminary compliance evaluation of all submitted proposals. Only those proposals that meet the stipulated procurement requirements—such as registration on the Central Supplier Database (CSD), tax compliance, and any other conditions specified in the bid documentation will be considered for further evaluation.

13.2. Phase 2: Functional evaluation

The second phase of the evaluation will assess the capability of the service provider to deliver on the specified requirements. This phase will be based on a functionality assessment, using clearly defined evaluation criteria and scoring. Only service providers that achieve a minimum score of **70%** or higher on functionality will qualify to proceed to Phase 3 of the evaluation process.

Measurement Matrix for Proposal

Scoring system					
0	**1**	**2**	**3**	**4**	**5**
Very Poor	**Poor**	**Average**	**Good**	**Very Good**	**Excellent**
Does not comply with the requirements	(Significantly below requirements)	(below requirement)	(Satisfactory and meets the requirements)	(Above average compliance to the requirements	(Exceeds the functionality requirements)

No.	Domain/ Descriptor	Functional Evaluation Criteria	Scote out of 5	Weighing
1.	**Understanding of the Terms of Reference (TORS)**	The proposal directly addresses the Terms of Reference (TORs) by clearly outlining the proposed approach, design, and methodology for the evaluation. Provides a well-reasoned justification for the selected study design and methods, demonstrating how they are appropriate for answering the key evaluation questions. Reflects a sound understanding of the programme context, ensure methodological rigour, and how the chosen approach will generate credible, relevant, and actionable findings. Clearly articulate the project requirements and scope of work, presenting a comprehensive and logical methodology, design, and approach. All proposed activities, milestones, and timeframes are clearly defined and well-structured The study design is thoroughly justified, demonstrating its relevance and suitability to the objectives of the evaluation The methodology is responsive to the Terms of Reference and aligned with the scope of work, ensuring the evaluation yields meaningful, credible, and actionable insights. 0 - Unacceptable (The proposal does not address the ToR requirements at all) 1 - Poor (The proposal poorly addressed the ToR requirements and stipulated one of the key elements) 2- Average (The proposal addressed some of the ToR requirements and stipulated two of the key elements) 3- Good (The proposal addressed all the ToR requirements (The approach, design, methodology for the evaluation is all included Clear justification of the rationale behind the study design, methodology and related approaches) 4- Very good (In addition to 3, shortcomings / limitation associated with the overall approach to be followed in the study identified and the mitigation strategies articulated) 5- Excellent (In addition to 4, there is demonstration of innovative and originality of methodology and		30

No.	Domain/ Descriptor	Functional Evaluation Criteria	Scote out of 5	Weighing
		approach to addressing the overall study requirements which are likely to increase the use)		
2.	**Evaluation Leadership**	Effectively lead the project and team to ensure successful completion, while employing facilitation and learning approaches that foster stakeholder commitment and ownership. This will be particularly important in engaging the following three key role players, ensuring their active participation, alignment with project objectives, and contribution to meaningful outcomes		15
		The Evaluation Specialist have proven experience in conducting various types of evaluations, including impact evaluations. The CV includes specific examples of previous evaluations undertaken, detailing the scope, methodologies used, and outcomes achieved. Additionally, at least two verifiable references from these evaluations are provided to demonstrate the specialist's competence, credibility, and track record in delivering high-quality, evidence-based evaluation work. 0-Unacceptable (no experience and never independently led government evaluation and or research project) 1-Poor (three years' experience in evaluation and independently led one government evaluation) 2-Average (Five years' experience in evaluation and independently led two government evaluations but not implementation/ outcome evaluation) 3-Good (five years' experience in evaluation and independently led three government evaluations in which one is implementation/ outcome evaluation and relevant post-graduate qualifications) 4-Very Good (Six to ten years' experience in evaluation and independently led four national evaluations in which two are implementation and outcome evaluations and relevant post-graduate qualifications) 5. Excellent (eleven and plus experience years in evaluation, independently led five government evaluations in which three are design, implementation and outcome evaluations and relevant master's qualifications)		
3.	**Infrastructure development Specialist**	The Infrastructure Development Specialist possesses extensive experience in the management and execution of construction projects, complemented by expertise in the planning and development of infrastructure systems such as roads, bridges, water supply, and sewage networks. Additionally, the		10

No.	Domain/ Descriptor	Functional Evaluation Criteria	Scote out of 5	Weighing
	A complete CV for the proposed specialist clearly indicates relevant qualifications, areas of expertise, and professional experience. The CV includes at least two verifiable references from similar completed projects, detailing the project scope, the specialist's role, and the outcomes achieved.	specialist brings in-depth knowledge of cost management and contract administration related to building and infrastructure initiatives, ensuring effective oversight and value-for-money in infrastructure development components. 0 – Unacceptable (no experience and relevant qualifications and no intervention designed/ implemented) 1 – Poor (less than five years' experience with civil engineering/ infrastructure development, relevant experience and two infrastructure projects designed and implemented) 2 – Average (six to nine years' experience in civil engineering/ infrastructure development, relevant experience and two infrastructure projects designed and implemented) 3 – Good (Ten years' experience in civil engineering/ infrastructure development, three infrastructure projects designed and implemented and relevant Postgraduate in Civil Engineering - specialising in infrastructure development) 4 – Very good (eleven to fifteen years' experience in civil engineering/ infrastructure development, four infrastructure projects designed and implemented and relevant Postgraduate in Civil Engineering - specialising in infrastructure development) 5 – Excellent (sixteen plus years' experience in civil engineering/ infrastructure development, five infrastructure projects designed and implemented and relevant Postgraduate in Civil Engineering - specialising in infrastructure development)		
4.	**Micro, Small and Medium Enterprises (MSME) Sector Specialist**	Bring in-depth knowledge and understanding of enterprise development, particularly in relation to MSME development, support, and implementation. This expertise is essential to ensure that the full complexity and richness of the SEIF Programme are thoroughly explored and that the evaluation yields insightful, contextually relevant, and actionable recommendations. A strong understanding of the relevant sector or intervention, as well as the associated government systems, to effectively contextualise the evaluation. This includes the ability to relate the evaluation findings to the current political, policy, and governance environments, ensuring that the recommendations		5

No.	Domain/ Descriptor	Functional Evaluation Criteria	Scote out of 5	Weighing
		are realistic, aligned with government priorities, and feasible within existing institutional frameworks.		
5.	**Implementation of the evaluation**			20
5.1	**Project Plan**	The quality of the activity-based plan is clear and provides a detailed breakdown of activities, ensuring that the efforts required for each consultant per activity is well-defined. The plan specifies the time frame linked to each activity, allowing for effective tracking and management of progress. The level of detail demonstrates a realistic allocation of resources and time, ensuring that the activities are manageable and achievable within the given timeline. The plan reflects the logical sequencing of tasks, with dependencies between activities clearly identified to ensure a smooth workflow throughout the project. 0 - Unacceptable (No Plan) 1 - Poor (Project plan did not include milestones) 2 - Average (Project plan with clear milestones presented) 3-Good (Project plan, with clear and realistic milestones) meeting timeframes described and an indication of resource allocation) 4 - Very Good (In addition to 3, risks and corrective measures identified) 5 - Excellent (In addition to 4, demonstration of additional information addressing requirements of the study)		
5.2	**Skills Transfer**	**Capacity Building for Emerging Evaluators within DSBD:** Incorporate an innovative and practical model for building the capacity of emerging evaluators and other staff within the Directorate: Sector-Wide Monitoring and Evaluation. This includes providing hands-on learning opportunities and technical exposure to key aspects of the evaluation process, thereby strengthening internal capacity in monitoring and evaluation practices. 0 - Unacceptable (No Plan) 1 - Poor (Capacity building plan did not include technical areas and milestones for execution) 2 - Average (Capacity building plan includes technical areas and milestones for execution clear milestones		10

No.	Domain/ Descriptor	Functional Evaluation Criteria	Scote out of 5	Weighing
		presented) 3 - Good (Capacity building plan includes technical areas with clear and realistic milestones as well an indication of resource allocation to emerging evaluators) 4 - Very Good (In addition to 3, innovative / model for effective capacity for emerging measures identified) 5 - Excellent (In addition to 4, presentation of technical tools (data collection and analysis) presented to effect transfer of skills addressing requirements this requirements of the study)		
5.3	**Evidence of previous bids in similar projects**	**Report Writing and Communication (Parameters):** Demonstrates the ability to produce clear, concise, and focused evaluation reports that are credible, useful, and actionable. Reports must directly address the key evaluation questions and clearly present the evidence, analysis, and synthesis. Recommendations should be well-grounded in the findings and evaluative interpretations, showing logical progression from data to insight. The reports are structured in a way that highlights how the various components (evidence, analysis, and conclusions) are interlinked, ensuring clarity, coherence, and utility for decision-making by stakeholders. 0- Unacceptable (None of the parameters mentioned above were met and there were severe shortcomings in the evaluation report) 1 - Poor (Most parameters mentioned above were not met and there were major shortcomings in the evaluation report) 2 - Average (More than one parameter mentioned above was unmet with significant shortcomings in the evaluation report) 3 - Good (All parameters mentioned above were fully met with minor shortcomings in the evaluation report) 4 - Very Good (All parameters mentioned above were fully met and there were no shortcomings in the evaluation report) 5- Excellent (in addition to 4, risks discussed in the evaluation report)		10

13.1. Phase 3: Price and BEE Contribution status level

Only bidders that score at least 80 points on the above out of 100 points on Functionality will be considered to the next phase, which will determine the bidder (s) to be recommended for approval by the delegated authority. The 80/20 Preference points system will be applied using the formula below to calculate the price:

The following formula will be used to calculate the points for price: Criteria	Points
Price Evaluation $$Ps\ 80\left(1-\frac{Pt-P\min}{P\min}\right)$$	80

Where,

Ps	=	Points scored for the comparative price of a bid under consideration
Pt	=	Comparative price of a bid under consideration
Pmin	=	Comparative price of lowest acceptable bid

In terms of Regulations 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points will be awarded to a bidder for attaining the Specific goals status level of contribution by the table as set out in the Preference Points Claim Form (SBD 6.1).

Table 1: Specific goals for the tender and points claimed are indicated per the table below. *Note to tenderers: The tenderer must indicate how they claim points for each preference point system.*)

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)
	2	

BEE Compliance Based on Section of the **BBBEE** Act (Act 53 of 2003 as amended by Act 46 of 2013)	Level 1 = 2 pts Level 2 = 1,75 pts Level 3 = 1,5 pts Level 4 = 1,25 pts Level 5 = 1 pts Level 6 = 0,75 pts Level 7 = 0,5 pts Level 8 = 0,25 pts Non-compliant contributor= 0	
	8	
Size of Enterprise (SMMES): MICRO, SMALL, MEDIUM ENTERPRISES	Micro = 8 Small = 5,6 Medium = 3,2 Large = 0,8	
	4	
Spatial (Rural/ Township/ City)	Rural = 4 Township = 2,4 City = 0,8	
	6	
Youth and Non-Youth	Youth = 6 None-Youth = 1,8	

14. GENERAL AND SPECIAL CONDITIONS OF CONTRACT

The awarding of the final contract will be contingent upon the successful conclusion of a Service-Level Agreement (SLA) between the DSBD and the selected service provider. The SLA will outline the agreed-upon terms, deliverables, timelines, and performance standards, ensuring mutual accountability and a clear framework for project implementation.

15. INTELLECTUAL PROPERTY

DSBD will retain full copyright ownership of all outputs and deliverables produced through this assignment, excluding any pre-existing material introduced by the service provider or content owned by third parties. The service provider may not use, reproduce, or distribute any part of the material generated during the assignment without prior written consent from DSBD.

16. ENQUIRIES

16.1 Proposal enquiries

The email address to which the proposal and/or related questions of clarity must be submitted is dsbdtenders@dsbd.gov.za

16.2 Technical Enquiries to the Evaluation Team

Name: Ms. Patricia Langa
Director: Sector-Wide Monitoring and Evaluation
Cellphone: 0661109877
Email: PLanga@dsbd.gov.za

1. BID INFORMATION - Move towards the end

Information on the format and delivery of bids are contained in the attached bid documents.

Please take note of the closing date.

2. PROPOSAL FORMAT

- **Annexure A** must contain the published terms of reference (this document).
- **Annexure B** must contain the proposal and services offered.
- **Annexure C** must contain a summary of the qualifications of evaluation and work experience of personnel.
- **Annexure D** must contain pricing information.
- **Annexure E** must contain all other forms/certificates required (SBDs, Tax clearance certificate etc. – see bid documents).

3. CONDITIONS OF BID

3.1. Administrative compliance

See bid documents

3.2. Functional Evaluation

Only bids / quotes that comply with all administrative requirements (acceptable bids) will be considered during the functional evaluation phase. All bids / quotes will be scored by the Bid Evaluation Committee against the functional criteria indicated in the Terms of Reference.

Minimum functional requirements: Service providers that submitted acceptable bids and that scored at least the minimum for each element as well as the overall minimum score (75%), based on the average of scores awarded by the Bid Evaluation Committee members.

3.3. Price evaluation: The PPPFA

See bid documents

ANNEXURE A

Please note this checklist must be completed and submitted together with the **Financial Proposal** (Envelope 1)

Document that must be submitted	**Non-submission may result in disqualification?**	
Invitation to Bid SBD 1	YES/NO	Complete and sign the supplied pro forma document
Tax Status	YES/NO	i. Proof of Registration on the Central Supplier Database (Refer Section 4.1.5) ii. Vendor number iii. In the event where the Bidder submits a hard copy of the Tax Clearance Certificate, the CSD verification outcome will take precedence.
Pricing Schedule- – SBD3.3	YES/NO	Complete and sign the supplied pro forma document
Declaration of InterestSBD 4	YES/NO	Complete and sign the supplied pro forma document
Preference Point ClaimForm SBD 6.1	YES/NO	Non-declaration and non-submission of the Sworn Affidavit and a valid BEE Certificate issued by a SANAS Accredited supplier will lead to a zero (0) score on BBBEE
Registration on Central Supplier Database (CSD	YES/NO	The Service Provider must be registered on the CSD. If you are not registered proceed to complete the registration of your company prior to submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Submit proof of registration.
Functional Proposal including Mandatory documents (Envelope 2)	YES	Submit a functional proposal in line with the Terms of Reference including the SBD documents above.
Pricing Schedule (Envelope 1)	YES	Submit full details of the pricing proposal

ToR Approved **YES** ☑ **NO** ☐

Date:

17 November 2025

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

2.2 Do you, or any person connected with the bidder, have a relationship

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.

with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:
…………………………………………………………………………………………
…………………………………………………………………………………………

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:
…………………………………………………………………………….
…………………………………………………………………………….

3 DECLARATION

I, the undersigned, (name)... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read and I understand the contents of this disclosure;
3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
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

---

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.

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 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

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
OWNERSHIP	2
SIZE OF ENTERPRISE (SMMES): MICRO, SMALL, MEDIUM ENTERPRISES	8
SPATIAL (RURAL/ TOWNSHIP/ CITY)	4

YOUTH AND NON-YOUTH	6
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:

80/20 **or** **90/10**

$$\boldsymbol{Ps} = \mathbf{80}\left(\mathbf{1} - \frac{\boldsymbol{Pt - P\,min}}{\boldsymbol{P\,min}}\right) \quad \text{or} \quad \boldsymbol{Ps} = \mathbf{90}\left(\mathbf{1} - \frac{\boldsymbol{Pt - P\,min}}{\boldsymbol{P\,min}}\right)$$

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:

80/20 **or** **90/10**

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

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)
OWNERSHIP	**1**	**2**		
	Level 1 = 1 pts Level 2 =0,125pts Level 3 = 0 pts Level 4 = 0 pts Level 5 = 0 pts Level 6 = 0 pts Level 7 = 0 pts Level 8 = 0 pts Non-compliant contributor= 0	Level 1 = 2 pts Level 2 = 1,75 pts Level 3 = 1,5 pts Level 4 = 1,25 pts Level 5 = 1 pts Level 6 = 0,75 pts Level 7 = 0,5 pts Level 8 = 0,25 pts Non-compliant contributor= 0		
Size of Enterprise (SMMES): MICRO, SMALL, MEDIUM ENTERPRISES	**4** Micro = 4 Small = 3,6 Medium = 2 Large = 1,6	**8** Micro = 8 Small = 5,6 Medium = 3,2 Large = 0,8		
Spatial (Rural/ Township/ City)	**2** Rural = 2 Township = 1,2 City = 0,4	**4** Rural = 4 Township = 2,4 City = 0,8		
Youth and Non-Youth	**3** Youth = 3 None-Youth = 0,9	**6** Youth = 6 None-Youth = 1,8		

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:	………………………………………………………
	………………………………………………………