NATIONAL LIBRARY OF SOUTH AFRICA

228 Johannes Ramokhoase Street	5 Queen Victoria Street
Private Bag X397	Cape Town
Pretoria	8001
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TERMS OF REFERENCE/ SPECIFICATIONS FOR PROCUREMENT OF AN INTEGRATED LIBRARY MANAGEMENT SYSTEM (LMS) FOR THE NATIONAL LIBRARY OF SOUTH AFRICA

Bid No: NLSA 08/2025-2026

Should you wish to deliver Bid documents, please note that the NLSA's working hours are from **08h00** to **17h00** on weekdays. Upon the submission of the Bid Documents Service Providers are requested to sign the register at reception.

COMPULSORY BRIEFING SESSION: YES

CLOSING DATE: 29 January 2026   **TIME: 11H00**

BID DOCUMENTS ARE AVAILABLE ON

- NLSA website (www.nlsa.ac.za/tenders-and-procurement)

NB. Completed Bid Documents must be deposited at the following address.

ADDRESS	CLOSING DATE	TIME
NLSA **Pretoria Campus**, 228 Johannes Ramokhoase Street, Pretoria CBD.	**29 January 2026**	**11H00**

1. BACKGROUND

1.1. National Library of South Africa (NLSA), hereafter referred to as NLSA, is a world class African National Library and Information Hub. The NLSA is responsible for collecting, recording, preserving, and making available the national documentary heritage of South Africa. The NLSA promotes awareness, appreciation, and access to published documents, nationally and internationally and in doing so contributes to the development and prosperity of South Africa. The NLSA has Campuses in Pretoria and Cape Town.

1.2. The NLSA has over 2, 5 million items of which some are on the current system, and some are still to be added. The NLSA collections are diverse and include manuscripts, photographs, monographs, serials, and digital images among others. The NLSA is also receiving electronic publications whing need to be managed within an integrated LMS.

1.3. Furthermore, NLSA is using several third-party systems, which need to be integrated and accessible through the LMS. The NLSA user population is spread out across the country and globally, therefor remote access as well as on site access are very critical for the NLSA to deliver on its mandate

2. SCOPE OF WORK

2.1. NLSA seeks to appoint a suitably qualified service provider to supply and render an Integrated Library Management System for a five-year period. The system should be able to handle large volumes of bibliographic records, user information, transaction data, and more.

2.2. The solution must provide full support for secure and standards-based API integration to enable interoperability with existing organisational systems, applications, and third-party platforms. The system must include well-documented Representational State Transfer RESTful or equivalent Application Programming Interface APIs that allow seamless data exchange, automated workflows, system-to-system communication, and real-time synchronisation. The API framework must support authentication, authorisation, encryption, and audit logging to ensure compliance with the organisation's security and governance requirements. The solution must be designed to integrate with current and future systems without requiring custom development that could limit scalability or upgradeability.

2.3. The solution must support strong encryption mechanisms (such as AES-256 for data at rest and TLS 1.2+ for data in transit). Encryption keys must be securely managed, regularly rotated, and protected from unauthorised access. No solution may store or transmit unencrypted sensitive or confidential information.

2.4. The solution must include or support an **AI-powered search capability** that enables advanced discovery, retrieval, and analysis of organisational information.

2.5. The solution must provide or support chatbot capabilities that enable automated, intelligent, and user-friendly interactions across digital platforms. The chatbot must leverage natural language processing (NLP) and machine learning to understand user queries, provide accurate responses, guide users through processes, and escalate complex issues to human support channels when necessary.

Chatbot functionality must include:

2.5.1. 24/7 self-service support for common queries

2.5.2. Integration with organisational systems through secure APIs

2.5.3. Ability to access and retrieve information from approved data sources

2.5.4. Multi-language support, including local languages where required

2.5.5. Context-aware conversation flows and adaptive learning to improve accuracy over time

2.5.6. Compliance with data protection, privacy, and security standards

2.5.7. Audit logging and reporting of interactions for monitoring and improvement

3. NLSA'S RIGHTS

3.1. The NLSA is entitled to amend any tender conditions, tender validity period, tender terms of reference, or extend the tender's closing date, all before the tender closing date. All Bidders, to whom the Bid documents have been issued and where the NLSA have record of such Bidders, may be advised in writing of such amendments in good time and any such changes will also be posted on the NLSA's website under the relevant Bid information. All prospective Bidders must, therefore, ensure that they visit the website regularly and before they submit their Bid response to ensure that they are kept updated on any amendments in this regard**.**

4. DURATION OF THE PROJECT

4.1. The duration of the contract is FIVE YEARS.

The appointed service provider(s) shall make an undertaking that the turnaround time to supply and deliver is within 90 days, unless specified otherwise or agreed in the Service Level Agreement (SLA).

5. CONDITIONS OF THE BID

5.1. The NLSA reserves the right not to accept the lowest proposal.

5.2. The NLSA reserves the right to appoint one or more Bidders.

5.3. The NLSA reserves the right not to award the contract.

5.4. The NLSA reserves the right to have any documentation, submitted by the successful Bidder checked or inspected by any other person or organisation.

5.5. The General Conditions of Contract will be applicable to this Bid.

5.6. The NLSA will not be held responsible for any costs incurred by the Bidder in the preparation and submission of the Bid.

5.7. The Bidder may be required to prepare for a presentation, and the Bidder shall be notified thereof in good time before the actual presentation date. Such a presentation may include a practical demonstration of products or services as called for in this Bid.

5.8. No upfront Payment will be done by NLSA.

5.9. The bid is valid for a period of 90 days and may be extended at the discretion of the NLSA.

6. EVALUATION CRITERIA

6.1 Pre evaluation (standard bid documents)

6.1.1 Fully Completed SBD 1, SBD 4,SBD 3.1, SBD 4, SBD 6.1, SBD 7.2 and SBD 9 forms.

6.1.2 The bidder must be registered on the Central Supplier Database (CSD).

6..2 **Mandatory technical criteria**

Please tick yes if the proposed solution offers the following:

No	Item	Description	Details	Available (Yes/No)
1	**System Requirements**			
1.1		Operating system	Windows and Mac OS	
1.2		Database support	Whether it's a relational database like MySQL or PostgreSQL or a NoSQL database, the system should be able to handle large volumes of data and scale as the library grows.	
1.3		Architecture	Software-As-A-Service (SaaS) solution supported by API	

			Support multiple browsers, e.g. Microsoft Windows Browser (Edge, Chrome, Firefox and Safari)	
			Mobile compliant either via web interface or app discovery	
1.4		Security features	Security features to handle sensitive data, transaction history and prevent unauthorized access	
			Data encryption	
1.5		Security of digital content	IP protected to prevent abuse of intellectual property	
1.6		Backup and data recovery plan	Cloud storage solution	
			Disaster recovery mechanism	
			Automatic and real time updates	
1.7		User access control	Authentication methods for role-based user access: · Administrators · Management · Librarians · General users · Public	
1.8		Accessibility	· Remote access · Adhere to web accessibility standards (include people living with disabilities) · Collaborative tools to improve workflow efficiencies · Accessible on mobile platforms	
1.9		Integration and compatibility	Compatible with assistive technologies, e.g. digitization, web harvesting, ISBN management systems, etc.	
			Ability to integrate with other enterprise and third party systems	
1.10		Scalability	The system should be able to handle a growing number of items (collections), different formats, users, and transactions without performance degradation	
			Adapt to technological development	
1.11		Reliability and performance	Must have an uptime and availability of 99,5% measured on monthly basis, excluding downtime for planned maintenance	
2. Discovery				
2.1		Discovery interface and customisation	Discovery app with responsive design, full branding and local customization without vendor	

			intervention and support for multilingual interfaces.	
			User friendly, accessible across devises.	
2.2		Unified search & metadata	Single search across all content types (catalogue, e-resources, IR, research data), enriched metadata: TOC, book covers, abstracts, FRBR clustering and deduplication, full MARC and RDA support. Correct display of non-Roman scripts and diacritics.	
2.3		Search & filtering	Basic and advanced search, faceted navigation and multiple filters (branch, format, date, availability). Weighting to provide for local holdings preference. Sort by date, relevancy ranking, author and title etc. Indicate ways to sort. Spellcheck, suggestions, peer-reviewed/full-text filters, Publication Finder and ability to limit by format (e.g. books, journals, etc). Indicate formats to limit by.	
2.4		Patron services	Batch updates from manual entry, allow for multiple addresses, unlimited patron types, search by multiple fields, notes, blocks, history retention, privacy options. Allow notes to be entered which will pop-up when patron records are opened. Must automatically add e.g. the name of the staff member who created the note. Allow a report per staff member with notes created.	
2.6		Integration with other systems	Integration with acquisitions (PDA/DDA), circulation (already in 3.4), LibGuides. Display all serial formats, Integration with Institutional Repository	
2.7		Performance & UX enhancement	The system should cater for persistent links, clustering (already in 3.2), authorship RDA relationships for quick new search of each name, staff MARC view, optimized recall/precision, fully responsive design for mobile and desktop.	
2.9		Usage statistics	The system should provide extensive usage statistics with graphs and downloadable and customizable reports.	

2.10		Chatbot	The system should cater for chatbots	
2.11		AI and future readiness	AI driven predictive search and personalization.	
			Continuous update to integrate new emerging technologies	
2.12		Compliance standards	Vendor must adhere to: NISO standards (Open Discovery Initiative, KBART), MARC21, RDA, Dublin Core for metadata, COUNTER and SUSHI for usage stats, Linked data and BIBFRAME for interoperability.	
2.13		Software compliance practices	RESTful APIs, microservices architecture, regular security patches and feature updates, Open APIs for third-party integrations.	
3. Access Management				
3.1	Use access management	User access functionalities	Should be able to filter, check availability, provide real time information on the status of an item	
			Allow for notification, e.g. long overdue notices and new items available based on user behaviour	
			Communication and interaction with users including, AI Library Assistant (chatbot)	
			Real time analytics of users' information use trends	
			The system must provide configurable automation for end-to-end processing of requests. This includes routing tasks to appropriate staff, sending automated notifications to patrons, managing approvals, and tracking task completion for all request types, including interlibrary loans and deliveries. Requesting of catalogue (print) items by taking the following into consideration: Users will place a request on an item in the discovery system.	
			Billing functionality	
			Booking functionality for library resources	
3.2		Administrator funtionalities	**User & Role Management**. Create, edit, deactivate, and delete user accounts.Assign and manage user roles, permissions, and access rights Enforce multi-factor authentication (MFA) and password policies	

				System Configuration Configure system settings, workflows, automation rules, and organisational preferences Manage integrations, API settings, and connectivity to other systems Customise templates, forms, dashboards, and metadata fields	
				Security & Compliance Management Manage encryption settings, data protections, and security controls Monitor user activity logs and audit trails Apply and enforce data retention policies and compliance standards	
				Content & Data Management Upload, update, archive, or delete records or content in accordance with roles Oversee storage usage, version control, and data integrity Manage backups, restoration processes, and data migration	
				System Monitoring & Reporting Access system health monitoring tools (performance, uptime, capacity) Generate and export administrative and operational reports Track errors, performance issues, and system notifications	
				Support & Maintenance Tools Manage updates, patches, and system upgrades Configure notifications and alerts for system events Provide administrative override capabilities for resolving user issues	
				Audit & Governance Full audit trail visibility for all administrator and user activities Tools for monitoring compliance with organisational ICT policies Ability to produce reports for audit, governance, and risk management	

3.3	Inte Library Loan management	ILL Integration	ILL module with ISO 10160/10161 compliance for peer-to-peer resource sharing and OCLC ILL Protocol compatibility (e.g., WorldShare ILL standards for interoperability and resource sharing). LMS should be compliant with OCLC Tipasa. ILL bibliographic records to be suppressed on bibliographic and item level.	
3.4		Request management	Centralised dashboard for all patron requests	
3.5		Automated notifications	Automated notifications	
3.6		Fines and holds management	Configurable fine rules by patron type and item category	
3.7		Workflow automation	The system must provide configurable automation for end-to-end processing of requests. This includes routing tasks to appropriate staff, sending automated notifications to patrons, managing approvals, and tracking task completion for all request types, including interlibrary loans and deliveries. Requesting of catalogue (print) items by taking the following into consideration: Users will place a request on an item in the discovery system.	
4. Resource Management – e-resources				
4.1		Digital repository (Trustworthy)	. Platform to ingest digital publications · Ingest web files on WAC format · Enable validation of ingested files · Enable metadata creation	
4.2		Digitisation repository	· Digitization repository that is able to display metadata together with images attached to it · Link related digital objects and metadata (families) · Allow for quality control and approval before publication · Discoverable to the end users	
4.3		Open access content	· Platform to harvest open access resources • Discoverable	
5. Resource Management – Acquisition				
5.1		Procurement of monographs, manuscripts etc.	Budget management functionality	

			Manage ordering process including order creation, revie and approval of orders	
			Management of order cancelations	
			Vendor management	
5.2		Manage subscriptions	Contract management of subscriptions (notifications)	
6. Resource Management – Legal deposit				
6.1		Link with publisher systems	Ability to ingest records from third party platforms such as ONIX	
6.2		Metadata information	Enable creation of brief record for internal use	
			Generate reports with audit trail including date received, person who received the item and the basic bibliographic information (ISB, Title, Author, Publisher, date and place of publication)	
7. Metadata Management				
7.1		Bibliographic control	Compliance with MARC21, Dublin Core, VRA, EAD and ISAD(G) Bibframe AACR and RDA Z39.50 standards	
			Support metadata formats associated with **different collection formats**	
			Ability to import and export bibliographic records to and from MARC 21 Formats and Web OPAC	
			Allow integration including downloading and uploading records to the World Catalogue	
7.2		Authority control	Support authority control and handle linked open data, Semantic Web technologies etc.	
7.3		Item-level description	Capacity to describe and link records of varying granularity or objects with complex & hierarchical relationships	
7.4		Barcodes	Read and process both 13/14 digit barcodes	
7.5		Digital resources integration	Linking to external databases for the cataloguing of e-books and online journals	
7.6		Multi-Lingual and Unicode support	Ability to catalogue and display records in multiple languages. Full Unicode support for international character sets and diacritics.	
7.7		Classification and indexing	Integration with classification Web Plus accessed from within the	

			system. Integration with subject indexing-controlled vocabulary - Library of Congress Subject Headings (LCSH)	
7.8		User integration and interoperability	Seamless integration with other modules, e.g. acquisitions and circulation. API support for third-party systems and data exchange. Real-time updates across modules to maintain data integrity. Integration with MarcEditor.	
7.9		Reporting	Ability to generate cataloguing statistics and extract auditable information from bibliographic, order and items records, either individually or in combination. Ability to select specific fields from bibliographic, order and items records, and export the data in various formats such as Excel, CSV and others.	
8. Serials management				
8.1		Serials administration	Receive issues Create prediction patten Missing issues – report/notice (Display/notification)	
			Ability to handle management both print and electronic serials	
9. Collections management				
9.1		Asset management	· Accommodate GRAP 103 & 17 fields · Stock taking functionality	
9.2		Manage movement of collections between departments	Allow for assignment of location codes when collections are in transit between departments	
9.3		Collection disposal	Enable withdrawal of collections for disposal and notes for the reason for disposal	
10 Administration and analytics				
10.1		Reports	Robust reporting capabilities. Generate various statical and reports	
			Intelligent analytics – user trends, new books information	
			Auditable transaction	
			Record integrity and authenticity	
			Reports should be downloadable in different formats include Excel/csv	
			Gathering and preparing data from various sources to prepare it for analysis. Converting raw data into meaningful insights that can be	

			used to make strategic business decisions, monitor performance, and identify opportunities	
			Presenting the analyzed data through charts, graphs, maps, and interactive dashboards to make it easier to understand.	
11. Support & Maintenance				
11.1		Dedicated personnel to manage onboarding	To manage migration (if required) – piloting, testing and ensuring data integrity	
11.2		Ongoing support	Onsite and remote support	
11.3		Training and tutorials	Training of all staff (65) including systems administrator (2) and technical support staff	
			Online manuals, guides, training/webinars	
			Maintenance and upgrades	
11.4		Communicating new developments	Listserve – communicate new system requires	

Only bidders who are fully responsive to the mandatory requirements in 6.1, will be considered for the functionality evaluation.

6.3 Functional criteria

No	Element	0	1	2	3	4	5	Weighted
	Technical							**100**
1.	**Bidders Experience** • Provide traceable references for similar work at a large institution such as a library or academic institution, in the past five years • Reference letters should be on a client letterhead, • Letters should include the following details: Client, the value of the project, work completed, date, and duration of the project Points allocated as follows: 1) 30 points = 3 contactable references with all the above requirements met 2) 20 points = 2 contactable references with all the above requirements met 3) 10 points = 1 contactable reference with all the above requirements met 4) 0 points = no contactable references with all the above requirements met							30
2	**Team leader experience** in implementing and managing an Integrated Library Management System experience. Provide CV of project team leader demonstrating relevant experience (including role played in a similar project, number of years) Points are allocated as follows: 1) More than 10 years = 10 points 2) 5 to 9 years = 5 points 3) Less than five years = 0 points							10

3	**Project plan** Provide a detailed proposal indicating the following: • Onboarding approach or implementation process to be followed • Organogram on project team allocation • Define roles and responsibilities for each team member • Detailed schedule demonstrating rollout plan starting from 30th June 2026 • Contingency plan for unforeseeable circumstances or Risk management plan including migration • Communication plan Points allocated as follows: 1) Proposal meeting all 6 above requirements fully met = 20 points 2) Proposal meeting 4-5 requirements fully met = 15 points 3) Proposal meeting 2-3 requirements = 10 points 4) Proposal meeting 1 of 6 requirements = 5 points 5) Proposal meeting none of the 6 requirements = 0							20
4	**Presentation demonstrating the following:** • Library user facing functionality • Workflows, including acquisition & cataloguing • Administration functions including a sample of reports and analytics available • System intelligence (AI integration) Points allocated as follows: 1) All 4 aspects fully addressed = 20 points 2) 3 aspects fully addressed = 15 points 3) 2 Aspect fully addressed = 10 points 4) 1 Aspect fully addressed = 5 points 5) None of the aspects addressed in full = 0 point							20
	Total							**100**
	Minimum points to pass this evaluation stage							**70**

NB: If there are any materials omission on the stated SBDs, bidders will be afforded a maximum of 2 working days to respond to the omission.

7. SUBMISSION FORMAT

Bid proposals should be submitted in the format as indicated below:

NB! One (1) signed original Bid document and One (1) signed electronic copy on a USB or CD (PDF protected with a code).

Bidders will be evaluated in two stages. First stage will be the technical evaluation and the second stage will be the price evaluation.

8.Evaluation Criteria Stage 3: Pricing

NB: Add yearly escalation of unit price per item over five-year period (see example below)

Item	Description	Unit price year one	Unit price year two	Unit price year three	Unit price year four	Unit price year five
Total Inclusive of VAT						

9. Preference Point System

In terms of Regulation 5 of the Preferential Procurement Regulations of 2022/23, Gazette Number 47452 dated 4 November 2022 pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be adjudicated by the State on the 80/20-preference point in terms of which points are awarded to bidders based on: -

- The bid price (maximum 80 points)

- Specific Goals (maximum of 20 points):

The following formula will be used to calculate the points out of 80 for price in respect of an invitation for a tender, inclusive of all applicable taxes.

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

Where-

Ps = Points scored for price of tender under consideration;

Pt = Price of tender under consideration; and

Pmin = Price of lowest acceptable tender.

10. Company ownership

- **Specific Goals (maximum of 20 points): -**

Specific Goals	Points
100% owned by people with disability	100% owned by people with disability - 10 points
	Less than 100% owned by people with disability - 5 points.
100% owned by youth	100% owned by youth - 10 points
	Less than 100% owned by youth - 5 points.

NB. Submit certified sworn affidavit or BEE certificate as evidence

11. ENQUIRIES

All enquiries regarding this tender must be directed to the SCM Office:

For any Bid-related enquiries, please send them to the following email address, quoting the Bid Number. Description as a Reference; kenny.netshiongolwe@nlsa.ac.za OR (012) 401 3017/9700/81