

REQUEST FOR PROPOSALS

YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED	
BID NUMBER:	RFP196/2026
COMPULSORY BRIEFING SESSION DETAILS:	06 November 2026 Time: 10:00am MS TEAMS LINK: Briefing Session Link-Click Here
CLOSING DATE:	23 November 2026
CLOSING TIME:	23H55 (Midnight)
PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:	120 days
DESCRIPTION OF BID:	APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER TO CONDUCT DBSA ANNUAL CLIENT SATISFACTION SURVEYS
BID DOCUMENTS ELECTRONIC SUBMISSION:	ELECTRONIC SUBMISSIONS <u>INSTRUCTIONS:</u> <ul style="list-style-type: none"> ➤ Bidders are required to submit written requests for clarification via e-mail to Tumim@dbsa.org ONLY, quoting the RFP Number on the subject of the e-mail. This must be done three (3) working days before the submission date. ➤ Bidders will thereafter receive a OneDrive Link to upload their submission documents electronically. ➤ Written requests for clarification will be considered up to and including 18th of November 2026 16:00 Johannesburg time. Requests received after this date may not be attended to. ➤ Any requests after the stipulated date and time may be disregarded. <p>NB: Electronic submission is encouraged for all bidders interested in this tender. Closing date of this RFP196/2026 is 23rd of November 2026 before 23:55PM. No physical bids will be received or accepted at the DBSA offices</p>

NAME OF BIDDER:	
CONTACT PERSON:	
EMAIL ADDRESS:	
TELEPHONE NUMBER:	
FAX NUMBER:	
BIDDER'S STAMP OR SIGNATURE	



The Development Bank of Southern Africa has a Zero Tolerance on Fraud and Corruption.
Report any incidents of Fraud and Corruption to Whistle Blowers on any of the following:

TollFree : 0800 20 49 33
Email : dbsa@whistleblowing.co.za
Free Post : Free Post KZN 665 | Musgrave | 4062
SMS : 33490

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**PART A
INVITATION TO BID**

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED ("DBSA")

BID NUMBER: **RFP196/2026**

DESCRIPTION: **APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER TO CONDUCT DBSA ANNUAL CLIENT SATISFACTION SURVEYS.**

COMPULSORY BRIEFING: 06th of November 2026 Tender briefing will be done online via Microsoft teams.

COMPULSORY BRIEFING LINK: [Briefing Session Link](#)-Click Here

Time: 10am Johannesburg time (**Microsoft Teams**)

Closing time for the OneDrive Link submissions – **16H00 on the 18th of November 2026 (Telkom Time)**

BID SUBMISSION CLOSING DATE: 23th of November 2026

CLOSING TIME: 23H55PM

Submission format (OneDrive)

Name

 Bidder Name

- a) It remains the bidder's responsibility to ensure that the bid submission is uploaded using the correct bidder document and tender link.
- b) Should a bidder encounter an issue with the system, the bidder must provide sufficient evidence as proof of attempting to upload their submission before the cut-off time and the error received.
- c) Faxed, emailed bids will not be accepted, only an electronic submission received via the link will be accepted.
- d) It is therefore the responsibility of the bidder to request for a link to participate.
- e) The DBSA assumes no responsibility if a Bidder's designated email address is not correct, or if there are technical challenges, including those with the Bidder's computer, network, or internet service provider (ISP)

BID SUBMISSION LINK REQUESTS:

ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS – (NOT TO BE RE-TYPED)

THIS BID IS SUBJECT TO THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT, WHICH ARE SET OUT IN PART C OF THIS DOCUMENT.

THE FOLLOWING PARTICULARS MUST BE FURNISHED (FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED).

BIDDERS THAT ARE UNINCORPORATED CONSORTIA CONSISTING OF MORE THAN ONE LEGAL ENTITY MUST SELECT A LEAD ENTITY AND FURNISH THE DETAILS OF THE LEAD ENTITY, UNLESS OTHERWISE SPECIFIED.

NAME OF BIDDER AND EACH ENTITY IN CONSORTIUM:				
POSTAL ADDRESS:				
STREET ADDRESS:				
CONTACT PERSON (FULL NAME):				
EMAIL ADDRESS:				
TELEPHONE NUMBER:				
FAX NUMBER:				
BIDDER REGISTRATION NUMBER OR REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM				
BIDDER VAT REGISTRATION NUMBER OR VAT REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM				
BBBEE STATUS LEVEL VERIFICATION CERTIFICATE/BBBEE	YES		NO	

1..1.1	ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES/WORKS OFFERED?	☐ Yes ☐ No [IF YES ENCLOSE PROOF]			
1..1.2	ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES/WORKS OFFERED?	☐ Yes ☐ No [IF YES ANSWER PART B:3 BELOW]			
1..1.3	SIGNATURE OF BIDDER				
1..1.4	DATE				
1..1.5	FULL NAME OF AUTHORISED REPRESENTATIVE				
1..1.6	CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)				
STATUS LEVEL SWORN AFFIDAVIT SUBMITTED?					
[TICK APPLICABLE BOX]					
IF YES, WHO ISSUED THE CERTIFICATE?					
REGISTERED WITH THE NATIONAL TREASURY CSD		YES		NO	
[TICK APPLICABLE BOX]					
CSD REGISTRATION NUMBER					
TAX COMPLIANCE STATUS PIN (TCS) NUMBER ISSUED BY SARS					

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
<p>1.1. BIDS MUST BE SUBMITTED ELECTRONICALLY BY THE STIPULATED TIME TO THE LINK PROVIDED. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED)</p> <p>1.3. SOUTH AFRICAN BIDDERS MUST REGISTER ON THE CENTRAL SUPPLIER DATABASE (CSD) TO UPLOAD MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS; AND BANKING INFORMATION FOR VERIFICATION PURPOSES). B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED BY BIDDING INSTITUTION.</p> <p>1.4. WHERE A BIDDER IS NOT REGISTERED ON THE CSD, MANDATORY INFORMATION NAMELY: (BUSINESS REGISTRATION/ DIRECTORSHIP/ MEMBERSHIP/IDENTITY NUMBERS; TAX COMPLIANCE STATUS MUST BE SUBMITTED WITH THE BID DOCUMENTATION. B-BBEE CERTIFICATE OR SWORN AFFIDAVIT FOR B-BBEE MUST BE SUBMITTED TO BIDDING INSTITUTION.</p>
2. TAX COMPLIANCE REQUIREMENTS
<p>2.1 ALL BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS IN THEIR COUNTRY OF RESIDENCE.</p> <p>2.2 SOUTH AFRICAN BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VIEW THE TAXPAYER'S PROFILE AND TAX STATUS.</p> <p>2.3 SOUTH AFRICAN BIDDERS CAN APPLY FOR TAX COMPLIANCE STATUS (TCS) OR PIN MAY ALSO BE MADE VIA E-FILING. IN ORDER TO USE THIS PROVISION, TAXPAYERS WILL NEED TO REGISTER WITH SARS AS E-FILERS THROUGH THE WEBSITE WWW.SARS.GOV.ZA.</p> <p>2.4 SA BIDDERS MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.</p> <p>2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED; EACH PARTY MUST SUBMIT A SEPARATE PROOF OF TCS / PIN / CSD NUMBER (TAX COMPLIANCE) IN ACCORDANCE WITH APPLICABLE LEGISLATION IN THEIR COUNTRY OF RESIDENCE.</p> <p>2.6 WHERE SA BIDDERS HAVE NO TCS AVAILABLE BUT ARE REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p>
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS
<p>3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? ☐ YES ☐ NO</p> <p>3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO</p> <p>3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO</p>

3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? ☐

YES ☐ NO

IF THE ANSWER IS “NO” TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.

NB: FAILURE TO PROVIDE ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

PART C

CHECKLIST OF COMPULSORY RETURNABLE SCHEDULES AND DOCUMENTS

Please adhere to the following instructions:

- Tick in the relevant block below.
- Ensure that the following documents are completed and signed where applicable; and
- Use the prescribed sequence in attaching the annexures that complete the Bid Document

NB: Should all these documents not be included, the Bidder may be disqualified on the basis of non-compliance

YES NO

☐ ☐ One original Bid document in separate folders; Folder 1 - for Pre-Qualifying Criteria and Functional Evaluation and Folder 2 - Price / Financial Proposal – **Electronic submission**

☐ ☐ **Part A:** Invitation to Bid

☐ ☐ **Part B:** Terms and Conditions of Bidding

☐ ☐ **Part C:** Checklist of Compulsory Returnable Schedules and Documents

☐ ☐ **Part D:** Conditions of Tendering and Undertakings by Bidders

☐ ☐ **Part E:** Specifications/Terms of Reference and Project Brief

☐ ☐ **Annexure A:** Price Proposal Requirement

☐ ☐ **Annexure B:** SBD4 Declaration of Interest

☐ ☐ **Annexure C:** SBD6.1 and B-BBEE status level certificate

- | | | |
|--------------------------|--------------------------|---|
| ☐ | ☐ | Annexure D: Certified copies of your CIPC company registration documents listing all members with percentages, in case of a close corporation. |
| ☐ | ☐ | Annexure E: Certified copies of latest share certificates, in case of a company. |
| ☐ | ☐ | Annexure F: (if applicable): A breakdown of how fees and work will be spread between members of the bidding consortium. |
| ☐ | ☐ | Annexure G: Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria. |
| ☐ | ☐ | Annexure H: General Condition of Contract |
| ☐ | ☐ | Annexure I: CSD Tax Compliance Status and Registration Requirements Report |

PART D

CONDITIONS OF TENDERING AND UNDERTAKINGS BY BIDDER

1. DEFINITIONS

In this Request for Proposals, unless a contrary intention is apparent:

- 1.1 **B-BBEE** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act, 2003;
- 1.2 **B-BBEE Act** means the Broad-Based Black Economic Empowerment Act, 2003;
- 1.3 **B-BBEE status level of contributor** means the B-BBEE status received by a measured entity based on its overall performance used to claim points in terms of regulation 6 and 7 of the Preferential Procurement Regulations, 2022.
- 1.4 **Business Day** means a day which is not a Saturday, Sunday or public holiday in South Africa.
- 1.5 **Bid** means a written offer in the prescribed or stipulated form lodged by a Bidder in response to an invitation in this Request for Proposal, containing an offer to provide goods, works or services in accordance with the Specification as provided in this RFP.
- 1.6 **Bidder** means a person or legal entity, or an unincorporated group of persons or legal entities that submit a Bid.
- 1.7 **Companies Act** means the Companies Act, 2008.
- 1.8 **Compulsory Documents** means the list of compulsory schedules and documents set out in Part B.
- 1.9 **Closing Time** for the OneDrive Link submissions – 16h00 on the 26 August 2024 (Telkom Time)
- 1.10 **DBSA** means the Development Bank of Southern Africa Limited.
- 1.11 **DFI** means Development Finance Institution.
- 1.12 **Evaluation Criteria** means the criteria set out under the clause 26 (Evaluation Process) of this Part C, which includes the Qualifying Criteria, Functional Criteria and Price and Preferential Points Assessment (where applicable).
- 1.13 **Functional Criteria** means the criteria set out in clause 27 of this Part C.
- 1.14 **Intellectual Property Rights** includes copyright and neighbouring rights, and all proprietary rights in relation to inventions (including patents) registered and unregistered trademarks (including service marks), registered designs, confidential information (including trade secrets and know how) and circuit layouts, and all other proprietary rights resulting from intellectual activity in the industrial, scientific, literary or artistic fields.
- 1.15 **PFMA** means the Public Finance Management Act, 1999.

- 1.16 **PPPFA** means the Preferential Procurement Policy Framework Act, 2000.
- 1.17 **PPPFA Regulations** means the Preferential Procurement Regulations, 2022 published in terms of the PPPFA.
- 1.18 **Pre-Qualifying Criteria** means the criteria set out in clause **Error! Reference source not found.** of this Part C.
- 1.19 **Price and Preferential Points Assessment** means the process described under clause 26.1.3 (third stage: price and Preference Points) of this Part C, as prescribed by the PPPFA.
- 1.20 **Proposed Contract** means the agreement including any other terms and conditions contained in or referred to in this RFP that may be executed between the DBSA and the successful Bidder.
- 1.21 **Request for Proposal** or **RFP** means this document (comprising each of the parts identified under Part A, Part B, Part C and Part D) including all annexures and any other documents so designated by the DBSA.
- 1.22 **SARS** means the South African Revenue Service.
- 1.23 **Services** means the services required by the DBSA, as specified in this RFP Part D.
- 1.24 **SLA** means Service Level Agreement.
- 1.25 **SOE** means State Owned Enterprise, as defined by the Companies Act.
- 1.26 **Specification** means the conditions of tender set and any specification or description of the DBSA's requirements contained in this RFP.
- 1.27 **State** means the Republic of South Africa.
- 1.28 **Statement of Compliance** means the statement forming part of a Tender indicating the Bidders compliance with the Specification.
- 1.29 **Tendering Process** means the process commenced by the issuing of this Request for Proposals and concluding upon formal announcement by the DBSA of the selection of a successful Bidder(s) or upon the earlier termination of the process.
- 1.30 **Website** means a website administered by DBSA under its name with web address www.dbsa.org

2. INTERPRETATIONS

In this RFP, unless expressly provided otherwise a reference to:

- 2.1 "includes" or "including" means includes or including without limitation; and
- 2.2 "R" or "Rand" is a reference to the lawful currency of the Republic of South Africa.

3. TENDER TECHNICAL AND GENERAL QUERIES

Queries pertaining to this tender must be directed to:-

DBSA Supply Chain Management Unit

Email: Tumim@dbsa.org

No questions will be answered telephonically.

4. SUBMISSION OF TENDERS

COMPULSORY BRIEFING: 06th of November 2026- Tender briefing will be done online via Microsoft teams.

LINK: [Briefing Session Link](#) -Click Here

Time: 10:00am Johannesburg time (**Microsoft Teams**)

LINK REQUESTS: Bidders are asked to nominate one dedicated contact person (name, email address and phone number to request a submission link in writing to Tumim@dbsa.org.

Tender Submission Deadline:

CLOSING DATE: 23th of November 2026

CLOSING TIME: 23H55pm

5. RULES GOVERNING THIS RFP AND THE TENDERING PROCESS

- 5.1 Participation in the tender process is subject to compliance with the rules contained in this RFP Part C.
- 5.2 All persons (whether a participant in this tender process or not) having obtained or received this RFP may only use it, and the information contained herein, in compliance with the rules contained in this RFP.
- 5.3 All Bidders are deemed to accept the rules contained in this RFP Part C.
- 5.4 The rules contained in this RFP Part C apply to:
 - 5.4.1 The RFP and any other information given, received or made available in connection with this RFP, and any revisions or annexure.
 - 5.4.2 the Tendering Process; and
 - 5.4.3 any communications (including any briefings, presentations, meetings and negotiations) relating to the RFP or the Tendering Process.

6. STATUS OF REQUEST FOR PROPOSAL

- 6.1 This RFP is an invitation for person(s) to submit a proposal(s) for the provision of the services as set out in the Specification contained in this RFP. Accordingly, this RFP must not be construed, interpreted, or relied upon, whether expressly or implicitly, as an offer capable of acceptance by any person(s), or as creating any form of contractual, promissory or other rights. No binding contract or other understanding for the supply of services will exist between the DBSA and any Bidder unless and until the DBSA has executed a formal written contract with the successful Bidder.

7. ACCURACY OF REQUEST FOR PROPOSAL

- 7.1 Whilst all due care has been taken in connection with the preparation of this RFP, the DBSA makes no representations or warranties that the content in this RFP or any information communicated to or provided to Bidders during the Tendering Process is, or will be, accurate, current or complete. The DBSA, and its officers, employees and advisors will not be liable with respect to any information communicated which is not accurate, current or complete.
- 7.2 If a Bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this RFP or any other information provided by the DBSA (other than minor clerical matters), the Bidder must promptly notify the DBSA in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the DBSA an opportunity to consider what corrective action is necessary (if any).
- 7.3 Any actual discrepancy, ambiguity, error or inconsistency in this RFP or any other information provided by the DBSA will, if possible, be corrected and provided to all Bidders without attribution to the Bidder who provided the written notice.

8. ADDITIONS AND AMENDMENTS TO THE RFP

- 8.1 The DBSA reserves the right to change any information in, or to issue any addendum to this RFP before the Closing Time. The DBSA and its officers, employees and advisors will not be liable in connection with either the exercise of, or failure to exercise this right.
- 8.2 If the DBSA exercises its right to change information in terms of clause 8.1, it may seek amended Tenders from all Bidders.

9. REPRESENTATIONS

No representations made by or on behalf of the DBSA in relation to this RFP will be binding on the DBSA unless that representation is expressly incorporated into the contract ultimately entered between the DBSA and the successful Bidder.

10. CONFIDENTIALITY

- 10.1 All persons (including all Bidders) obtaining or receiving this RFP and any other information in connection with this RFP, or the Tendering Process must keep the contents of the RFP and other such information confidential and not disclose or use the information except as required for the purpose of developing a proposal in response to this RFP.

11. REQUESTS FOR CLARIFICATION OR FURTHER INFORMATION

- 11.1 All communications relating to this RFP and the Tendering Process must be directed to the Tender Officer.
- 11.2 All questions or requests for further information or clarification of this RFP or any other document issued in connection with the Tendering Process must be submitted to the Tender Officer in writing, and most preferably by e-mail to tumim@dbsa.org
- 11.3 Any communication by a Bidder to the DBSA will be effective upon receipt by the Tender Officer (provided such communication is in the required format).
- 11.4 The DBSA has restricted the period during which it will accept questions or requests for further information or clarification and reserves the right not to respond to any enquiry or request, irrespective of when such enquiry or request is received.
- 11.5 Except where the DBSA is of the opinion that issues raised apply only to an individual Bidder, questions submitted and answers provided will be made available to all Bidders by e-mail, as well as on the DBSA's website without identifying the person or organisation which submitted the question.
- 11.6 In all other instances, the DBSA may directly provide any written notification or response to a Bidder by email to the address of the Bidder (as notified by the Bidder to the Tender Manager).
- 11.7 A Bidder may, by notifying the Tender Officer in writing, withdraw a question submitted in accordance with clause 12, in circumstances where the Bidder does not wish the DBSA to publish its response to the question to all Bidders.

12. UNAUTHORISED COMMUNICATIONS

- 12.1 Communications (including promotional or advertising activities) with staff of the DBSA or their advisors assisting with the Tendering Process are not permitted during the Tendering Process, or otherwise with the prior consent of the Tender Officer. Nothing in this clause 12 is intended to prevent communications with staff of, or advisors to, the DBSA to the extent that such communications do not relate to this RFP or the Tendering Process.
- 12.2 Bidders must not otherwise engage in any activities that may be perceived as, or that may have the effect of, influencing the outcomes of the Tendering Process in any way.

13. IMPROPER ASSISTANCE, FRAUD AND CORRUPTION

- 13.1 Bidders may not seek or obtain the assistance of employees of the DBSA in the preparation of their tender responses.
- 13.2 The DBSA may in its absolute discretion, immediately disqualify a Bidder that it believes has sought or obtained such improper assistance.
- 13.3 Bidders are to be familiar with the implications of contravening the Prevention and Combating of Corrupt Activities Act, 2004 and any other relevant legislation.

14. ANTI-COMPETITIVE CONDUCT

- 14.1 Bidders and their respective officers, employees, agents and advisors must not engage in any collusion, anti-competitive conduct or any other similar conduct in respect of this Tendering Process with any other Bidder or any other person(s) in relation to:
 - 14.1.1 the preparation or lodgement of their Bid
 - 14.1.2 the evaluation and clarification of their Bid; and
 - 14.1.3 the conduct of negotiations with the DBSA.
- 14.2 For the purposes of this clause 14, collusion, anti-competitive conduct or any other similar conduct may include disclosure, exchange and clarification of information whether or not such information is confidential to the DBSA or any other Bidder or any other person or organisation.
- 14.3 In addition to any other remedies available to it under law or contract, the DBSA may, in its absolute discretion, immediately disqualify a Bidder that it believes has engaged in any collusive, anti-competitive conduct or any other similar conduct during or before the Tendering Process.

15. COMPLAINTS ABOUT THE TENDERING PROCESS

- 15.1 Any complaint about the RFP or the Tendering Process must be submitted to the Supply Chain Management Unit in writing, by email, immediately upon the cause of the complaint arising or becoming known to the Bidder, (tenders@dbsa.org)
- 15.2 The written complaint must set out:
- 15.2.1 the basis for the complaint, specifying the issues involved;
 - 15.2.2 how the subject of the complaint affects the organisation or person making the complaint;
 - 15.2.3 any relevant background information; and
 - 15.2.4 the outcome desired by the person or organisation making the complaint.
- 15.3 If the matter relates to the conduct of an employee of the DBSA, the complaint should be addressed in writing marked for the attention of the Chief Executive Officer of the DBSA, and delivered to the physical address of the DBSA, as notified.

16. CONFLICT OF INTEREST

- 16.1 A Bidder must not, and must ensure that its officers, employees, agents and advisors do not place themselves in a position that may give rise to actual, potential or perceived conflict of interest between the interests of the DBSA and the Bidder's interests during the Tender Process.
- 16.2 The Bidder is required to provide details of any interests, relationships or clients which may or do give rise to a conflict of interest in relation to the supply of the services under any contract that may result from this RFP. If the Bidder submits its Bid and a subsequent conflict of interest arises, or is likely to arise, which was not disclosed in the Bid, the Bidder must notify the DBSA immediately in writing of that conflict.
- 16.3 The DBSA may immediately disqualify a Bidder from the Tendering Process if the Bidder fails to notify the DBSA of the conflict as required.

17. LATE BIDS

- 17.1 Bids must be delivered by the Closing Time. The Closing Time may be extended by the DBSA in its absolute discretion by providing written notice to Bidders.
- 17.2 Bids delivered after the Closing Time or lodged at a location or in a manner that is contrary to that specified in this RFP will be disqualified from the Tendering Process and will be ineligible for consideration. However, a late Bid may be accepted where the Bidder can clearly demonstrate (to the satisfaction of the DBSA, in its sole discretion) that late lodgement of the Bid was caused by the DBSA; that access was denied or hindered in relation to the physical tender box; or that a major/critical incident hindered the delivery of the Bid and, in all

cases, that the integrity of the Tendering Process will not be compromised by accepting a Bid after the Closing Time.

- 17.3 The determination of the DBSA as to the actual time that a Bid is lodged is final. Subject to clause 17.2, all Bids lodged after the Closing Time will be recorded by the DBSA and will only be opened for the purposes of identifying a business name and address of the Bidder. The DBSA will inform a Bidder whose Bid was lodged after the Closing Time of its ineligibility for consideration. The general operating practice is for the late Bid to be returned within 5 (five) working days of receipt or within 5 (five) working days after determination not to accept a late Bid.

18. BIDDER'S RESPONSIBILITIES

- 18.1 Bidders are responsible for:

- 18.1.1 examining this RFP and any documents referenced or attached to this RFP and any other information made or to be made available by the DBSA to Bidders in connection with this RFP;
- 18.1.2 fully informing themselves in relation to all matters arising from this RFP, including all matters regarding the DBSA's requirements for the provision of the Services;
- 18.1.3 ensuring that their Bids are accurate and complete;
- 18.1.4 making their own enquiries and assessing all risks regarding this RFP, and fully considering and incorporating the impact of any known and unknown risks into their Bid;
- 18.1.5 ensuring that they comply with all applicable laws in regard to the Tendering Process particularly as specified by National Treasury Regulations, Guidelines, Instruction Notes and Practice Notes and other relevant legislation as published from time to time in the Government Gazette; and
- 18.1.6 submitting all Compulsory Documents.

- 18.2 South African bidders with annual total revenue of ZAR10 million or less qualify as Exempted Micro Enterprises (EMEs) in terms of the B-BBEE Act must submit a certificate issued by a registered, independent auditor (who or which is not the Bidder or a part of the Bidder) or an accredited verification agency.

- 18.3 South African bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy, or a sworn affidavit thereof, substantiating their B-BBEE status. The submission of such certificates must comply with the requirements of instructions and guidelines issued by National Treasury and be in accordance with the applicable notices published by the Department of Trade and Industry in the Government Gazette.

- 18.4 The DBSA reserves the right to require of a Bidder, either before a Bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the DBSA.

18.5 Failure to provide the required information may result in disqualification of the Bidder.

19. PREPARATION OF BIDS

19.1 Bidders must ensure that:

19.1.1 their Bid is submitted in the required format as stipulated in this RFP; and

19.1.2 all the required information fields in the Bid are completed in full and contain the information requested by the DBSA.

19.2 The DBSA may in its absolute discretion reject a Bid that does not include the information requested or is not in the format required.

19.3 Unnecessarily elaborate responses or other representations beyond that which is sufficient to present a complete and effective tender proposal are not desired or required. Elaborate and expensive visual and other presentation aids are not necessary.

19.4 Where the Bidder is unwilling to accept a specified condition, the non-acceptance must be clearly and expressly stated. Prominence must be given to the statement detailing the non-acceptance. It is not sufficient that the statement appears only as part of an attachment to the Bid or be included in a general statement of the Bidders usual operating conditions.

19.5 An incomplete Bid may be disqualified or assessed solely on the information completed or received with the Bid.

20. ILLEGIBLE CONTENT, ALTERATION AND ERASURES

20.1 Incomplete Bids may be disqualified or evaluated solely on information contained in the Bid.

20.2 The DBSA may disregard any content in a Tender that is illegible and will be under no obligation whatsoever to seek clarification from the Bidder.

20.3 The DBSA may permit a Bidder to correct an unintentional error in its Bid where that error becomes known or apparent after the Closing Time, but in no event will any correction be permitted if the DBSA reasonably considers that the correction would materially alter the substance of the Bid or affect the fairness of the Tendering Process.

21. OBLIGATION TO NOTIFY ERRORS

If, after a Bidder's Response has been submitted, the Bidder becomes aware of an error in the Bidder's Response (including an error in pricing but excluding clerical errors which would have no bearing on the evaluation of the Bid), the Bidder must promptly notify the DBSA of such error.

22. RESPONSIBILITY FOR BIDDING COSTS

- 22.1 The Bidder's participation or involvement in any stage of the Tendering Process is at the Bidder's sole risk, cost and expense. The DBSA will not be held responsible for, or pay for, any expense or loss that may be incurred by Bidders in relation to the preparation or lodgement of their Bid.
- 22.2 The DBSA is not liable to the Bidder for any costs on the basis of any contractual, promissory or restitutionary grounds whatsoever as a consequence of any matter relating to the Bidder's participation in the Tendering Process, including without limitation, instances where:
- 22.2.1 the Bidder is not engaged to perform under any contract; or
 - 22.2.2 the DBSA exercises any right under this RFP or at law.

23. DISCLOSURE OF BID CONTENTS AND BID INFORMATION

- 23.1 All Bids received by the DBSA will be treated as confidential. The DBSA will not disclose contents of any Bid and Bid information, except:
- 23.1.1 as required by law;
 - 23.1.2 for the purpose of investigations by other government authorities having relevant jurisdiction;
 - 23.1.3 to external consultants and advisors of the DBSA engaged to assist with the Tendering Process; or for the general information of Bidders required to be disclosed as per National Treasury Regulations, Guidelines, Instruction Notes or Practice Notes.

24. USE OF BIDS

- 24.1 Upon submission in accordance with the requirements relating to the submission of Bids, all Bids submitted become the property of the DBSA. Bidders will retain all ownership rights of any intellectual property contained in the Bids.
- 24.2 Each Bidder, by submission of their Bid, is deemed to have licensed the DBSA to reproduce the whole, or any portion, of their Bid for the sole purposes of enabling the DBSA to evaluate the Bid.

25. BID ACCEPTANCE

All Bids received must remain open for acceptance for a minimum period of 120 (one-hundred and twenty) days from the Closing Time. This period may be extended by written mutual agreement between the DBSA and the Bidder.

26. EVALUATION PROCESS

26.1 The Bids will be evaluated and adjudicated as follows:

26.1.1 First Stage – Test for administrative Responsiveness

The test for administrative responsiveness will include the following:

Stage 1: Responsiveness

The Tenderer should be able to provide all the relevant information required in the Supplier Information Form (SIF) which will include but is not limited to;

A. Tenderers who do not adhere to those criteria listed a PRE-QUALIFIER, will be disqualified immediately.

Responsiveness Criteria		Prequalifying Criteria	Applicable to this Tender (Y/N)
1	Adherence to submitting Tender as a two-folder tender. Folder 1: Functionality and returnable submission separate from Folder 2: Pricing proposal submission	Pre-Qualifier	Y
2	Attendance Register of the Compulsory Briefing Session attended by the Tenderer.	Pre-Qualifier	Y

B. Tenderers who do not adhere to the indicated response time for clarifications requested by the Employer will be deemed to be non-responsive and their submissions will not be evaluated further.

Responsiveness Criteria		Clarification Time	Applicable to this Tender (Y/N)
1	Standard conditions of tender as required.	48hours	Y
2	Returnable documents completed and signed.	48hours	Y
3	Submission of Registration with National Treasury Central Supplier Database (CSD) Summary Report: - Bidder must be registered to do business with the DBSA.	7 Working Days	Y
4	A Tax Pin issued by SARS.	7 Working Days	Y

Only those Bidders which satisfy all the Pre-Qualifying Criteria of the First Stage will be eligible to participate in the Tendering Process further. Bids which do not satisfy all the Pre-Qualifying Criteria of the First Stage will not be evaluated further.

26.1.2 **Second Stage –Technical/Functional criteria**

Only those Bidders who meet the minimum score (70) or above out of 100 of the technical requirements will proceed to pricing evaluation (third Stage). Bidders are required to submit supporting documentation evidencing their compliance with each requirement, where applicable. Bidders will be assessed on the functionality criteria (Second Stage) as set out in this RFP.

26.1.3 **Third Stage – price**

26.1.3.1 Those Bidders which have passed the First Stage (Responsiveness Test) and Second Stage (Functionality Evaluation) of the tender process will be eligible to be evaluated on the Third Stage, based on price, in accordance with the PPPFA regulations.

26.1.3.2 The recommended preferred Bidder will be the Bidder with the lowest overall price in the Third Stage of the Bid evaluation, unless the DBSA exercises its right to cancel the RFP, in line with the PPPFA Regulations.

26.2 NB: Bidders are required to submit, as Annexure G to their Bids, any documentation which supports the responses provided in respect of the functionality Criteria above.

27. Risk Analysis and Objective Criteria

Risk Analysis and Objective Criteria (This must only be included in the tender document if it is applicable, ensure that the list is specific as to what your objective criteria are)

The DBSA reserves the right to award the tender to the tenderer who scores the highest number of points overall in line with Section (2) (1) (f) of the PPPFA, unless there are objective criteria which will justify the award of the tender to another tenderer. The objective criteria that the DBSA may apply in this bid process include:

- i. Any bidder that has a cumulative order book totalling 5 Awards with outstanding value, **may be excluded from further evaluation.**
- ii. Where a bidder has 5 active Awards with an outstanding value and the outstanding value is 10% or less, indicating the project is nearing completion, the bidder may be included **for further evaluation and/or recommendation for award.**
- iii. Where a bidder has 5 active Awards with an outstanding value and at least one of the projects has stalled for a period of 6 months or more, or the client has placed the project on hold indefinitely, the bidder may be included **for further evaluation and/or recommendation for award.**
- iv. The DBSA has the discretion to apply an objective criterion.

28. Due Diligence

DBSA shall perform a due diligence exercise on the preferred bidder to determine its risk profile. The due diligence exercise may take the following factors into account inter alia.

a. Judgements and criminal convictions

DBSA may consider previous civil judgements against the preferred bidder as part of its risk assessment. DBSA may also consider whether the preferred bidder or any of its directors have been convicted of a serious offence.

b. Pending litigation/liquidation/business rescue (distinct from Working Capital)

DBSA may consider any pending litigation in a court of law or administrative tribunal as part of its risk assessment.

c. Performance

DBSA will not consider the Service provider having a history of poor performance on any task orders/purchase orders or contracts, including poor performance in respect of compliance with policies or procedures regarding safety, health, quality control or environment, or having committed a serious and gross breach of contract.

d. Reputational harm

If DBSA is likely to suffer substantial reputational harm because of doing business with the preferred service provider, it may take this into account as part of its risk assessment.

e. Restricted/Blacklisted

Is not under restrictions, or has principals who are under restrictions, preventing participating in the employer's procurement.

f. Vetting

The DBSA reserves the right to conduct vetting on the tenderer or any of its directors.

g. PEP Checks for both Companies and Individual directors, as well as Procure Check and/or any other systems that the DBSA may choose to utilize (which may be conducted by an authorized third party) that would be done to assess all risks, including but not limited to

- a. Financial stability of the bidder based on key ratio analysis ;
- b. Efficiency;
- c. Profitability;

- d. Financial Risk;
- e. Liquidity;
- f. Acid Test;
- g. Solvency; and
- h. Commercial relationship with a politically exposed and brand risk.

- i. The DBSA reserves the right to award the scope in full or part thereof, subject to budget availability.
- ii. The DBSA reserves the right to negotiate to ensure the value for money principle is not compromised.

- 29.** Generally, suppliers have their own business standards and regulations. Although DBSA cannot control the actions of our suppliers, we will not tolerate any Illegal activities. These include, but are not limited to:
- Misrepresentation of any kind (e.g. origin of manufacture, specifications, intellectual property rights, etc.);
 - Collusion;
 - Failure to disclose accurate information required during the sourcing activity (ownership, financial situation, BBBEE status, etc.);
 - Corrupt activities listed above; and
 - Harassment, intimidation or other aggressive actions towards DBSA employees.

30. STATUS OF BID

- 30.1 Each Bid constitutes an irrevocable offer by the Bidder to the DBSA to provide the Services required and otherwise to satisfy the requirements of the Specification as set out in this RFP.
- 30.2 A Bid must not be conditional on:
- 30.2.1 the Board approval of the Bidder or any related governing body of the Bidder being obtained.
 - 30.2.2 the Bidder conducting due diligence or any other form of enquiry or investigation.
 - 30.2.3 the Bidder (or any other party) obtaining any regulatory approval or consent.
 - 30.2.4 the Bidder obtaining the consent or approval of any third party; or
 - 30.2.5 the Bidder stating that it wishes to discuss or negotiate any commercial terms of the contract.
- 30.3 The DBSA may, in its absolute discretion, disregard any Bid that is, or is stated to be, subject to any one or more of the conditions detailed above (or any other relevant conditions).
- 30.4 The DBSA reserves the right to accept a Bid in part or in whole or to negotiate with a Bidder in accordance with the provisions of this RFP and the applicable laws and regulations.

31. CLARIFICATION OF BIDS

- 31.1 The DBSA may seek clarification from and enter into discussions with any or all of the Bidders in relation to their Bid. The DBSA may use the information obtained when clarification is sought or discussions are held in interpreting the Bid and evaluating the cost and risk of accepting the Bid. Failure to supply clarification to the satisfaction of the DBSA may render the Bid liable to disqualification.
- 31.2 The DBSA is under no obligation to seek clarification of anything in a Bid and reserves the right to disregard any clarification that the DBSA considers to be unsolicited or otherwise impermissible or irrelevant in accordance with the rules set out in this RFP.

32. DISCUSSION WITH BIDDERS

- 32.1 The DBSA may elect to engage in detailed discussions with any one or more Bidder(s), with a view to maximising the benefits of this RFP as measured against the evaluation criteria and in fully understanding a Bidder's offer.
- 32.2 Where applicable, the DBSA will invite Bidders to give a presentation to the DBSA in relation to their submissions.
- 32.3 The DBSA is under no obligation to undertake discussions with, and Bidders.
- 32.4 In addition to presentations and discussions, the DBSA may request some or all Bidders to:
- 32.4.1 conduct a site visit, if applicable.
 - 32.4.2 provide references or additional information; and/or
 - 32.4.3 make themselves available for panel interviews.

33. SUCCESSFUL BIDS

- 33.1 Selection as a successful Bidder does not give rise to a contract (express or implied) between the successful Bidder and the DBSA for the supply of the Services. No legal relationship will exist between the DBSA and a successful Bidder for the supply of the Services until such time as a binding contract is executed by them.
- 33.2 The DBSA may, in its absolute discretion, decide not to enter into pre-contractual negotiations with a successful Bidder.
- 33.3 A Bidder is bound by its Bid and all other documents forming part of the Bidder's Response and, if selected as a successful Bidder, must enter into a contract on the basis of the Bid with or without further negotiation.

34. NO OBLIGATION TO ENTER INTO CONTRACT

- 34.1 The DBSA is under no obligation to appoint a successful Bidder or Bidders (as the case may be), or to enter into a contract with a successful Bidder or any other person, if it is unable to identify a Bid that complies in all relevant respects with the requirements of the DBSA, or if due to changed circumstances, there is no longer a need for the Services requested, or if funds are no longer available to cover the total envisaged expenditure. For the avoidance of any doubt, in these circumstances the DBSA will be free to proceed via any alternative process.
- 34.2 The DBSA may conduct a debriefing session for all Bidders (successful and unsuccessful). Attendance at such debriefing session is optional.

35. BIDDER WARRANTIES

- 35.1 By submitting a Bid, a Bidder warrants that:
- 35.1.1 it did not rely on any express or implied statement, warranty or representation, whether oral, written, or otherwise made by or on behalf of the DBSA, its officers, employees, or advisers other than any statement, warranty or representation expressly contained in the RFP;
 - 35.1.2 it did not use the improper assistance of DBSA employees or information unlawfully obtained from them in compiling its Bid;
 - 35.1.3 it is responsible for all costs and expenses related to the preparation and lodgement of its Bid, any subsequent negotiation, and any future process connected with or relating to the Tendering Process;
 - 35.1.4 it accepts and will comply with the terms set out in this RFP; and
 - 35.1.5 it will provide additional information in a timely manner as requested by the DBSA to clarify any matters contained in the Bid.

36. DBSA'S RIGHTS

- 36.1 Notwithstanding anything else in this RFP, and without limiting its rights at law or otherwise, the DBSA reserves the right, in its absolute discretion at any time, to:
- 36.1.1 cease to
 - 36.1.2 in the Tendering Process.
 - 36.1.3 require additional information or clarification from any Bidder or any other person;
 - 36.1.4 provide additional information or clarification.
 - 36.1.5 negotiate with any one or more Bidder;
 - 36.1.6 call for a new Bid.
 - 36.1.7 reject any Bid received after the Closing Time; or

36.1.8 reject any Bid that does not comply with the requirements of this RFP.

37. GOVERNING LAWS

37.1 This RFP and the Tendering Process are governed by the laws of the Republic of South Africa.

37.2 Each Bidder must comply with all relevant laws in preparing and lodging its Bid and in taking part in the Tendering Process.

37.3 All Bids must be completed using the English language and all costing must be in South African Rand (ZAR).

PART E

TERMS OF REFERENCE

*APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER TO CONDUCT DBSA ANNUAL CLIENT
SATISFACTION SURVEYS*

RFP196/2026

1. Background

The Development Bank of Southern Africa (DBSA), established under the Development Bank of Southern Africa Act, No. 13 of 1997, is a state-owned Development Finance Institution (DFI) wholly owned by the Government of South Africa and reporting to the Minister of Finance. As a critical component of the national infrastructure system, the DBSA is mandated to promote economic development and growth, human resource development, and institutional capacity building by mobilising financial and other resources from national and international private and public sectors for sustainable development projects and programmes.

A key pillar of the DBSA's strategy is **Smart Partnerships**, which promote purposeful collaboration to co-create development solutions, strengthen stakeholder relationships, in this case clients, and mobilise private sector participation in infrastructure projects that enable inclusive growth. To support its strategic objectives and maintain strong client relationships, the DBSA conducts an annual Client Satisfaction (CSAT) Survey to evaluate client perceptions of its products, services, service delivery, staff capabilities, pricing, and brand reputation. Accordingly, the DBSA seeks to appoint a suitably qualified service provider to design and implement a comprehensive hybrid CSAT survey, combining digital engagement platforms with quantitative and qualitative research methodologies.

The survey will measure overall client satisfaction, identify key drivers of trust and relationship quality, highlight service delivery strengths and challenges, and uncover opportunities to strengthen existing relationships and cultivate new ones. Beyond generating a performance metric for the Corporate Balanced Scorecard (BSC), the findings must deliver actionable insights and recommendations to inform client relationship management, marketing, communications and continuous service improvement initiatives across the DBSA.

2. Context

The Client Satisfaction Survey (CSAT) provides the DBSA with a holistic view of client experiences across the service lifecycle, including engagement, service delivery, issue resolution, grievance handling, and aftercare support. The survey assesses client perceptions, satisfaction levels, and the likelihood of continued engagement with the DBSA, enabling the organisation to understand how its products, services, staff, and overall client experience are perceived. The insights generated support evidence-based decision-making and continuous improvement across the organisation by identifying key drivers of satisfaction and dissatisfaction, service delivery gaps, client pain points, and opportunities to strengthen relationships. The survey also provides a performance measure for the BSC and supports the development of targeted interventions to enhance client experience,

service delivery, and stakeholder engagement.

More importantly, the survey is aligned to the DBSA's Decadal Strategy and its strategic goals of accelerating development impact, building smart partnerships, fostering a future-fit organisation, and maintaining long-term financial sustainability. By viewing its performance through the lens of the client, the DBSA can strengthen client-centricity and reinforce its partnership-driven approach to development.

Accordingly, the DBSA is seeking a service provider capable of delivering an end-to-end CSAT solution that combines the usage of a modern digital engagement platforms with robust quantitative and qualitative research methodologies. The service provider will be required to collect, analyse, and interpret data; identify the key drivers of client trust, satisfaction, and loyalty; highlight operational challenges that affect service delivery; and provide actionable, evidence-based recommendations for improvement.

The survey must include segmentation analysis, trend analysis, and benchmarking (where feasible) to support targeted interventions and strategic decision-making. Ultimately, the findings should provide practical pathways for enhancing client relationships, improving service delivery, and maximising the DBSA's development impact.

3. Purpose of Terms of Reference

The Development Bank of Southern Africa (DBSA) seeks to appoint a suitably qualified and experienced service provider to design, implement, manage, analyse, and report on its Annual Client Satisfaction Survey (CSAT) for the 2026/27 and 2027/28 financial years. The purpose of the survey is to obtain independent, reliable, and actionable feedback from DBSA clients to assess client satisfaction, experience, perceptions, and relationship quality across the Bank's products, services, and engagements. The survey findings will support strategic decision-making, service improvement initiatives, organisational performance monitoring, and reporting against the Corporate Balanced Scorecard (BSC). The survey forms part of DBSA's commitment to client-centricity and continuous improvement and supports the implementation of the Bank's Decadal Strategy, which emphasises strong partnerships, institutional effectiveness, and sustainable development impact.

3.1. Objectives

The objectives of the Client Satisfaction Survey are to:

- Measure and monitor levels of client satisfaction, experience, trust, loyalty, advocacy, and dissatisfaction across the DBSA's products, services and engagements.
- Identify and analyse the key drivers of client satisfaction and dissatisfaction, including service delivery strengths, gaps, risks and opportunities for

improvement.

- Generate credible, reliable, objective, and evidence-based insights to support executive decision making, performance management and continuous organisational improvement.
- Strengthen client relationships and build trust through structured, consistent and meaningful feedback mechanisms.
- Evaluate the effectiveness of service delivery and enable the Bank to continuously improve its overall service performance and client experience.
- Benchmark DBSA's client experience performance against relevant industry standards, development finance institutions and leading practices, where feasible.
- Provide practical, prioritised, and actionable recommendations, including improvement plans, to enhance client experience, service delivery, organisational effectiveness and stakeholder value.
- Support ongoing monitoring and reporting of client feedback, satisfaction levels and customer experience trends to inform strategic planning and service excellence initiatives.

This initiative is aligned with DBSA's strategic objectives and supports the implementation of its 10-year strategy, which emphasises the importance of smart partnerships to enhance institutional effectiveness, service delivery, and developmental impact.

4. Scope of Work

The appointed service provider will be responsible for the end-to-end delivery and management of the DBSA Annual Client Satisfaction Survey (CSAT) programme for the 2026/27 and 2027/28 financial years. The scope of work includes the design, implementation, administration, analysis, reporting, and continuous enhancement of the survey programme to ensure credible, statistically sound, and decision useful results. The service provider will be required to:

- Develop and maintain a robust CSAT methodology, including survey framework, sampling strategy, respondent segmentation, questionnaire design and quality assurance processes.
- Conduct annual survey fieldwork across DBSA client segments using appropriate data collection methodologies to achieve representative client participation and agreed response rate targets.
- Manage all survey administration activities, including respondent engagement, communications, follow-ups, data validation, and adherence to confidentiality and data protection requirements.

- Analyse survey results to identify satisfaction levels, client experience trends, key drivers of satisfaction and trust, service delivery strengths and weaknesses, emerging risks, and opportunities for improvement.
- Produce annual and ad hoc reporting, including executive reports, presentations, datasets, infographics, and management summaries tailored to different stakeholder audiences.
- Develop, host, maintain, and update an interactive dashboard that enables authorised DBSA users to access survey results, trend analyses, segmentation insights, and performance indicators in real time.
- Facilitate result interpretation sessions, management workshops, and stakeholder engagements to support the translation of survey findings into practical improvement actions.
- Provide benchmarking, where applicable, and conduct trend analysis between survey cycles to monitor performance over time.
- Support the implementation and monitoring of agreed improvement initiatives arising from survey findings during the contract period.
- Transfer knowledge and build internal capability through training and guidance on survey methodologies, interpretation of results, and utilisation of client experience insights.

The scope includes all personnel, systems, licenses, tools, project management, quality assurance processes and other resources necessary for the successful delivery of the Client Satisfaction Survey programme and associated reporting requirements.

4.1. Overview Of Survey Programme Requirements

4.1.1. Voice of Customer and Digital Experience Capability

DBSA is establishing an integrated Voice of Customer (VoC) capability to strengthen the measurement and management of client experience across the organisation. The appointed Service Provider must demonstrate proven expertise in customer experience management, stakeholder perception research, and survey programme administration through recognised digital experience management platforms. The Service Provider must be capable of:

- Designing and administering surveys through digital platforms;
- Managing respondent databases;
- Configuring automated survey distribution channels;
- Monitoring response rates and fieldwork progress;
- Managing closed-loop feedback processes;

- Performing advanced analytics and insight generation;
- Developing interactive dashboards and reporting solutions; and
- Supporting continuous customer experience improvement initiatives.

Preference will be given to Service Providers with demonstrated experience supporting large, complex organisations.

4.2. Hybrid Survey Design and Sampling Methodology

The service provider shall design and implement a hybrid survey methodology that captures feedback from DBSA clients across all relevant products and services. The survey must generate insights across key client facing business units including the Chief Investment Office (CIO) Cluster, Programmes Division, Infrastructure Delivery Division and Loan Management Unit.

The research design should enable analysis across relevant client characteristics including client segment, geographic location (beyond the borders of South Africa), nature and scale of engagement with the DBSA, organisational profile, client expectations, decision-making criteria and client status (current, former and prospective clients).

The service provider must develop a statistically sound sampling framework and data collection methodology that achieves a minimum 95% confidence level and a margin of error not exceeding for the $\pm 5\%$ overall survey results. The sampling approach must clearly define the target population, sampling technique, sample size calculations and response rate targets. The methodology must produce reliable, valid and actionable findings and identify the key drivers of satisfaction, trust, loyalty and advocacy, as well as factors contributing to dissatisfaction or service delivery challenges.

4.3. Survey Administration and Data Collection

The Service Provider shall manage all aspects of survey administration, including:

- Respondent engagement and communications;
- Survey deployment and monitoring;
- Response-rate management;
- Fieldwork quality assurance;
- Data validation and verification; and
- Survey closure and database management.

The Service Provider shall implement appropriate strategies to maximise participation and achieve at least a response rate of between 50% and 60% of the targeted sample

population. Where this threshold is not achieved, the Service Provider shall provide evidence-based explanations and mitigation measures.

4.4. Data Management, Analytics and Insights

The Service Provider shall ensure the confidentiality, integrity, availability and security of all data collected throughout the contract period.

The Service Provider shall comply with all applicable legislation and governance requirements, including:

- Protection of Personal Information Act, 2013 (POPIA);
- Promotion of Access to Information Act, 2000 (PAIA);
- Electronic Communications and Transactions Act, 2002 (ECTA);
- Cybercrimes Act, 2020;
- Relevant information security and records management requirements; and
- DBSA information security, data governance, and confidentiality policies.

Analysis must extend beyond descriptive reporting and include:

- Quantitative analysis;
- Qualitative analysis;
- Satisfaction and loyalty driver analysis;
- Client segmentation analysis;
- Trend analysis;
- Comparative analysis;
- Thematic analysis of open-ended responses;
- Sentiment analysis;
- Emerging risk identification;
- Service improvement opportunity assessment; and
- Benchmarking against relevant industry standards where feasible.

Industry benchmarks may include development finance institutions, public sector financial institutions, infrastructure financiers, and recognised customer experience benchmarks.

4.5. Dashboard and Reporting Solution

The Service Provider shall develop and maintain interactive dashboards using Microsoft Power BI or an equivalent platform approved by DBSA. The dashboard solution must:

- Provide near real-time visibility of survey results;

- Support filtering and drill-down analysis;
- Enable analysis by client segment, geography, business unit, and other relevant dimensions;
- Present customer satisfaction trends and key performance indicators;
- Support executive, management, and operational reporting requirements;
- Facilitate self-service access to survey insights; and
- Generate automated alerts for predefined satisfaction thresholds and critical client issues where feasible.

The solution must be scalable, user-friendly, and compatible with DBSA's existing Microsoft technology environment.

4.6. Reporting and Internal Stakeholder Engagement

The service provider will produce comprehensive and executive-level reports that translate survey findings into actionable business insights. Deliverables shall include:

- Key findings;
- Satisfaction and experience indicators;
- Client perceptions and expectations;
- Areas of strength and improvement;
- Comparative and trend analysis;
- Root-cause analysis;
- Strategic implications;
- Practical recommendations; and
- Proposed improvement actions.

The service provider will be required to present findings to relevant internal stakeholders, including client-facing divisions, management structures, Executive Committee (EXCO) and Board Committees, as required. Where necessary, the service provider may be required to facilitate workshops and stakeholder engagements to support interpretation of results and implementation planning.

5. Deliverables Timelines and Key Performance Indicators (KPIs)

5.1. Overview

The appointed service provider will deliver an annual Client Satisfaction Survey (CSAT) programme over a two-year period (2026/27 – 2027/28), supported by the integration of quarterly client feedback and pulse survey insights. The service provider will be responsible for the end-to-end design, implementation, analysis, reporting, and presentation of findings, ensuring that all outputs support DBSA's client-centric strategy, BSC requirements, and Development Impact objectives. The assignment must produce credible, reliable, and

actionable client experience insights that support evidence-based decision-making, service improvement, stakeholder relationship management, and continuous organisational learning.

5.2. Key Deliverables

The service provider will be responsible for delivering the following outputs annually and throughout the contract period.

5.2.1. Annual Deliverables Year 1 Deliverables

Milestone	Activity / Deliverable	Timeline	Performance Measure
1	Project initiation, stakeholder engagement, confirmation of scope, methodology, sampling framework and project plan.	Weeks 1-2	Approved project plan, methodology, and sampling framework submitted within 10 working days of project commencement.
2	Survey instrument design, programming, testing and DBSA approval.	Weeks 3-4	Survey instruments and data collection tools approved by DBSA before commencement of fieldwork.
3	Survey fieldwork and data collection	Weeks 5-10	Minimum response rate achieved; bi-weekly progress reports submitted; fieldwork completed within approved timeframe.
4	Data validation, cleaning, quality assurance, and dataset preparation	Week 11	100% completion of data quality checks; final validated dataset submitted.
5	Quantitative and qualitative data analysis, including segmentation, trend and key driver analysis.	Weeks 12-13	Comprehensive analytical outputs completed and quality assured.
6	Development and population of interactive dashboard and reporting tools.	Weeks 12-14	Functional dashboard with agreed filters, visualisations and reporting capabilities delivered.
7	Submission of draft report, preliminary findings, recommendations and management presentation.	Week 14	Draft report and presentation submitted for DBSA review.
8	Presentation of findings and incorporation of DBSA feedback.	Week 15	Findings presented to DBSA management and feedback incorporated into final outputs.

9	Submission of final report, executive presentation, datasets, dashboard access and recommendations	Week 16	All final deliverables submitted and accepted by DBSA.
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6Year 2: Implementation Support Phase

Milestone	Activity / Deliverable	Timeline	Performance Measure
10	Implementation planning and prioritisation workshop	Month 1	Facilitate at least one workshop to translate survey findings into prioritised improvement actions and implementation roadmap
11	Recommendation implementation support	Months 2-10	Quarterly advisory sessions with business units to support implementation of approved recommendations and address emerging challenges
12	Progress monitoring and dashboard updates	Quarterly	Progress reports and updated dashboards reflecting implementation status, completed actions, and performance improvements
13	Mid-year implementation review	Month 6	Delivery of a mid-year review report assessing progress against agreed improvement initiatives and identifying corrective actions where required
14	Impact assessment and close-out report	Month 12	Final implementation impact assessment report measuring progress against baseline CSAT results, lessons learned, and recommendations for the next survey cycle

5.2.2. Overall Service Level Requirements

- **Year 1:** Completion of the Client Satisfaction Survey within 16 weeks of project commencement with 100% delivery of agreed milestones and deliverables.
- **Year 2:** Provision of implementation support, monitoring and advisory services over a 12-month period following acceptance of the final survey report.
- Submission of quarterly implementation progress reports and facilitation of a minimum

of four quarterly review sessions with DBSA.

- Achievement of 100% compliance with agreed reporting, workshop and advisory support deliverables.

5.2.3. Continuous (Quarterly Integration) Deliverables

To support continuous client experience monitoring, the service provider will:

- Incorporate insights from internal quarterly pulse and transactional surveys;
- Consolidate and analyse quarterly feedback trends from client touchpoints;
- Identify emerging client experience risks and opportunities;
- Provide quarterly client experience insights to support proactive decision making, where required; and
- Maintain ongoing updates to dashboard reporting and trend analysis.

a) Reporting Deliverables

(i) Executive Briefing Report

A concise executive report (approximately 2 - 3 pages) summarising:

- Key findings;
- Strategic implications;
- Critical risks and opportunities;
- Priority recommendations.

(ii) Comprehensive Main Survey Report

A detailed report containing:

- Research methodology;
- Demographic and segmentation analysis;
- Statistical and thematic analysis;
- Satisfaction, loyalty, and trust metrics;
- Trend and benchmarking analysis;
- Sentiment analysis findings;
- Key drivers and barriers;
- Strategic recommendations and implementation priorities.

(iii) Divisional Reports

Tailored reports for relevant client-facing divisions, that:

- Highlight division-specific findings;
- Identify localised service delivery challenges;
- Provide practical recommendations and improvement actions;
- Include visual summaries and infographics suitable for management discussions.

b) Presentations and Project Closeout

(i) Executive and Board Presentations

The service provider shall prepare:

- EXCO presentation deck;
- Board Committee presentation deck(s), as required;
- Presentation materials incorporating infographics, dashboards, trend analysis, and key insights.

(ii) Presentation Support

The service provider will:

- Present findings to relevant DBSA governance structures;
- Facilitate discussion sessions and stakeholder engagements;
- Provide technical clarification on methodology and results during presentations.

(iii) Close-Out Workshop

The service provider shall facilitate a knowledge-transfer and close-out workshop with relevant DBSA stakeholders to:

- Present final findings and recommendations;
- Demonstrate dashboard functionality;
- Discuss implementation priorities;
- Support handover of project outputs and data assets.

5.3. Expected Outcomes

The assignment is expected to deliver:

- Reliable and data-driven insights into client satisfaction and experience;
- Annual and ongoing measurement of client sentiment and relationship quality;
- Enhanced understanding of client expectations, needs, and challenges;
- Improved service delivery, client engagement, and relationship management;
- Stronger evidence-based decision-making across the organisation;
- Effective monitoring of client experience performance through BSC indicators; and

- Measurable support for the DBSA's client-centric, partnership-driven, and development impact objectives.

5.3.1. Impact Indicators

The survey findings should contribute to:

- Adoption and implementation of recommendations by DBSA business units;
- Improvement in client satisfaction, loyalty, and advocacy metrics over the contract period;
- Reduction in service delivery challenges and TGW incidents;
- Improved client retention, repeat business, and relationship quality;
- Enhanced client-centric decision-making across the organisation;
- Improved stakeholder engagement and partnership outcomes; and
- Achievement of Corporate Balanced Scorecard (BSC) objectives and strategic performance targets.

5.3.2. Service Delivery KPIs

The service provider will also be assessed on:

- Quality, relevance, and usability of reports and recommendations;
- Accuracy and credibility of research findings and analysis;
- Quality of presentations and stakeholder engagements;
- Responsiveness to DBSA requests and feedback;
- Effectiveness of collaboration with DBSA teams and business units;
- Functionality and accessibility of dashboard and reporting tools; and
- Overall stakeholder satisfaction with the service delivery process.

6. Competencies and Eligibility of the Service Provider

The DBSA seeks to appoint a suitably qualified and experienced service provider with demonstrated expertise in client satisfaction measurement, customer experience research, stakeholder perception studies, and advanced analytics. The successful bidder must demonstrate the following minimum qualifications, competencies, and capabilities:

6.1. Organisational Experience and Capability

- A minimum of ten (10) years' proven organisational experience in the design and implementation of Client Satisfaction, Customer Experience, Stakeholder Perception, or related research programmes;
- Demonstrated experience managing large-scale, multi-stakeholder research projects;

- Proven expertise in end-to-end survey design, implementation, analytics, reporting, and insight generation;
- A strong track record of delivering similar assignments within development finance institutions, financial services organisations, state-owned entities, private and public sector institutions, or related sectors; and
- Demonstrated experience in managing both annual strategic surveys and ongoing client experience monitoring programmes.

6.2. Team Composition and Qualifications

The proposed project team must comprise suitably qualified professionals with relevant expertise in research, analytics, and stakeholder engagement. Key personnel must possess:

- Relevant tertiary qualifications (minimum Bachelor's degree) in research, statistics, economics, social sciences, business, marketing, data analytics or related disciplines;
- A minimum of five (5) years' relevant experience for each proposed key resource; and
- Proven experience in client experience measurement, quantitative and qualitative research, data analytics, reporting and stakeholder engagement.

6.3. Technical Competencies

The service provider must demonstrate proven capability in:

6.3.1. Research Design and Data Collection

- Designing and implementing quantitative and qualitative research methodologies aligned with international best practices;
- Developing statistically sound sampling frameworks and stakeholder segmentation models;
- Conducting surveys, key informant interviews, focus groups, and stakeholder consultations; and
- Implementing integrated data collection approaches that combine traditional and digital research methodologies.

6.3.2. Client Experience Measurement

- Measuring and interpreting Customer Satisfaction Score (CSAT), Net Promoter Score (NPS), Customer Effort Score (CES), Things Gone Wrong (TGW), and other client experience indicators;
- Client journey mapping and customer experience analysis;
- Identification of client satisfaction drivers, barriers, and behavioural trends; and

- Development of client experience improvement strategies and action plans.

6.3.3. Advanced Analytics and Insight Generation

- Advanced statistical analysis, including multivariate analysis, factor analysis, segmentation analysis, and correlation modelling;
- Qualitative analysis and sentiment analysis of stakeholder feedback;
- Trend analysis, benchmarking, and predictive analytics;
- Translation of complex findings into actionable business insights and recommendations; and
- Production of executive-level reporting and visual analytics.

6.3.4. Digital Survey and Technology Solutions

- Ability to use and develop surveys using various digital survey platforms and real-time feedback mechanisms;
- Deployment of automated survey channels, including email, SMS, web-based, and mobile survey solutions;
- Development of secure and interactive dashboards using platforms business intelligence tools;
- and
- Integration of reporting tools and dashboards into organisational performance management processes.

6.4. Internal Stakeholder Engagement and Communication

The service provider must demonstrate:

- Strong facilitation and stakeholder engagement capabilities;
- Experience presenting findings to executive management, boards, and governance structures;
- Excellent written and verbal communication skills;
- Ability to produce clear, concise, and executive-ready reports and presentations; and
- Proven capability to facilitate workshops and translate research findings into practical improvement initiatives.

7. Evaluation Criteria

7.1. Evaluation Approach

Proposals will be evaluated using a two-stage process comprising a Technical Evaluation and Price Evaluation. Only bidders that meet the minimum technical threshold will proceed to the subsequent stage of the procurement process. The technical evaluation will assess the bidder's ability to successfully deliver the Client Satisfaction Survey programme, with emphasis on experience, methodology, capacity, innovation, and quality assurance. The evaluation approach is aligned with DBSA's Monitoring, Evaluation and Strategic Performance principles, ensuring that the appointed service provider demonstrates the capability to deliver measurable outputs, outcomes, and impact.

7.2. Technical Evaluation Criteria

Table 1: Functionality Evaluation Criteria and Scoring Framework (100 Points)

Evaluation Criteria	Sub-Criteria	Portfolio of Evidence Required	Points Allocation	Weighting (Points)
1.Company Experience and Track Record	Relevant Client Satisfaction, Customer Experience, Stakeholder Perception completed within the last five (5) years	Bidder to provide project list of completed projects in customer satisfaction experience (refer to Appendix A for a template) .	No relevant projects submitted = 0; 1 to 2 projects = 2; 3 to 4 projects = 7; 5 or more projects = 10	10
	Quality and relevance of reference letters	Minimum three (3) signed, dated and verifiable reference letters on a company letter head ,indicating the description/scope undertaken and duration	No valid reference letters submitted = 0; 1 letter = 2; 2 letters = 7; 3 or more letters = 10.	10
	Subtotal			20

<p>2.Project Team and Resources</p>	<p>Qualifications and Experience of key personnel: A Bachelor's Degree for each team member and a Master's Degree for the team lead in any relevant discipline backed by demonstrable experience supplied in CVs.</p>	<p>Bidders to provide CVs of all multi-disciplinary team members, showing relevant experience, role, and attach required qualifications. (NB: failure to provide proof of qualification will score zero).</p> <p>Table of all members competency matrix showing coverage of required expertise and organogram. Signed declaration confirming full availability of proposed team throughout the project.</p>	<p>30 points: A compact team of up to three (3) experts with clearly defined roles; AND</p> <p>A Team Leader with at least ten (10) years' experience in client surveys, research, and customer experience methodologies (CSAT, NPS, CES, TGW, and related measures); AND Each team member with at least five (5) years' experience in client surveys, research, and customer experience methodologies (CSAT, NPS, CES, TGW, and related measures).</p> <p>21 points: A compact team of up to three (3) experts with clearly defined roles; AND</p> <p>A Team Leader with at least seven (7) years' experience in client surveys, research, and customer experience methodologies (CSAT, NPS, CES, TGW, and related measures); AND</p> <p>Each team member with at least three (3) years' experience in client surveys, research, and customer experience</p>	<p>30</p>
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			methodologies (CSAT, NPS, CES, TGW, and related measures).	
			0 points = Failure to meet all of the requirements	
	Subtotal			30
3.Methodology and Technical Approach	Understanding of DBSA requirements and stakeholder environment	<p>The bidder to submit a detailed proposal (25 pages maximum) demonstrating understanding of the assignment and objectives and expected outcomes. The proposal must include:</p> <ul style="list-style-type: none"> • CSAT methodology and approach (including CSAT, NPS, CES, TGW, and other relevant measures). • Data collection and analysis framework. • Detailed workplan, timelines, milestones and deliverables. • Quality assurance framework and risk mitigation measures. • Proposed approach to be used to ensure that the response rate targets are achieved. • Demonstrated capability to leverage digital research and customer experience technologies, including: <ul style="list-style-type: none"> • oDigital survey platforms. • oCustomer experience management (CXM) systems. • oInteractive dashboards 	<p>Comprehensive methodology addressing all required elements (7), including CSAT framework, sampling, segmentation, data collection, quality assurance, analysis, reporting, response-rate management, and risk mitigation = 30</p> <p>Sound methodology addressing at least six (6) required elements = 21</p> <p>Limited methodology addressing three (3) to five (5) required elements, = 10</p> <p>Methodology addresses fewer than three (3) required elements or generic or is not fit for purpose. = 0</p>	30

	Subtotal			30
4. Project Management, Delivery Readiness and Quality Assurance	Project Implementation Plan comprising governance and stakeholder matrix; risk management approach and quality assurance matrix	Detailed project plan outlining: <ul style="list-style-type: none"> • milestones, • timelines • deliverables, • project governance structure, • communication plan • issue escalation procedures, • risk register and mitigation strategy 	Comprehensive project plan addressing all 7 required elements: governance, stakeholder management, risk management, quality assurance, timelines, deliverables, and resource allocation = 20 Sound project plan addressing 5 to 6 required elements, = 14 Project plan addresses 3 to 4 required elements = 5 Project plan addresses less than 3 required elements = 0	20
	Subtotal			20
		TOTAL FUNCTIONALITY SCORE		100

Functionality Threshold

Requirement	Score
Minimum Functionality Threshold	70 Points out of 100

NB: Bidders are required to submit all supporting documentation listed under the Portfolio of Evidence column. Failure to submit the required evidence may result in the allocation of zero (0) points for the applicable sub-criterion. Only bidders achieving a minimum functionality score of **70 points out of 100** will be considered for further evaluation stages.

Annexure A_Pricing Schedule (attached Separately**)**

Bidders are required, as annexure A to provide a detailed Costing.

BIDDER'S DISCLOSURE**1. PURPOSE OF THE FORM**

- 1.1 Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa, 1996 (Constitution), and further expressed in the various applicable legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.
- 1.2 If a person is listed in the Register for Tender Defaulters and/or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. DECLARATION ON EMPLOYMENT BY ORGAN OF STATE

- 2.1 Is the bidder, or any of the directors / trustees / shareholders / members / partners of the bidder employed by an organ of state, as defined in section 239 of the Constitution? **YES/NO**
- 2.2 If YES, furnish particulars of the names, individual identity numbers, in the table below:

Full Name	Identity Number	Name of organ of state

- 2.3 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.3.1 If so, furnish particulars:

.....
.....
.....

2.4 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**

2.4.1If so, indicate all companies registered in the CSD in the table below:

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

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

3 GENERAL DECLARATION

I,, the undersigned, 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 to be false.
- 3.3 The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor.
- 3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 3.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding

process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

- 3.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act, 1998 (Act No. 89 of 1998) and or may be referred to law enforcement agencies for criminal investigation and or may be restricted from conducting business with the state for a period not exceeding 10 years in terms of the Prevention and Combating of Corrupt Activities Act, 2004 (Act No. 12 of 2004) or any other applicable legislation.

I CERTIFY THAT THE ABOVE IS CORRECT.

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

.....
Signature Date

.....
Designation 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 **80/20** preference point system.
- b) The **80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

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

- (a) Price; and
- (b) Specific Goals (namely, BBBEE status level of contributor).

1.4 **To be completed by the organ of state:**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
PREFERENCE POINTS	20

Total points for Price and Preference Points

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 PREFERENCE POINT SYSTEMS

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

80/20

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

Where

P_s = 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 points is allocated for price on the following basis:

80/20

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

Where

Ps = Points scored for price of 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 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 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 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 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)
1	10	20		
2	9	18		
3	6	14		
4	5	12		
5	4	8		
6	3	6		
7	2	4		
8	1	2		
Non-compliant contributor	0	0		

(Note: Bidders are required to submit their BBBEE certificates or sworn affidavits (in the case of EMEs/QSEs) in order to be eligible to claim points)

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:.....

.....

RESTRICTED SUPPLIERS

- 1 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	Yes ☐	No ☐
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p>The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.</p>	Yes ☐	No ☐
4.2.1	If so, furnish particulars:		
4.3	Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?	Yes ☐	No ☐
4.3.1	If so, furnish particulars:		
4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes ☐	No ☐
4.4.1	If so, furnish particulars:		

Annexure D

Bidders are required to include, as Annexure D to their Bids, certified copies of all relevant CIPC registration documents listing all members with percentages, in the case of a close corporation

Annexure E

Bidders are required, as annexure E to their Bids, to submit certified copies of the latest share certificates of all relevant companies

Annexure F

Bidders which submit Bids as an unincorporated joint venture, consortium or other association of persons are required to submit, as Annexure F, a breakdown of how the percentage (%) fees and work will be split between the various people or entities which constitute the Bidder.

Annexure G

Bidders are required to include, as Annexure G to their Bids, supporting documents to their responses to the Pre- Qualifying Criteria and Evaluation Criteria.

Where the supporting document is the profile of a member of the Bidder's proposed team, this should be indicated.

Annexure H

[General Conditions of Contract]

PLEASE NOTE THAT ALL BIDDERS ARE REQUIRED TO READ THROUGH THE GENERAL CONDITIONS OF CONTRACT PRESCRIBED BY THE NATIONAL TREASURY. SUCH GENERAL CONDITIONS OF CONTRACT CAN BE ACCESSED ON THE NATIONAL TREASURY WEBSITE.

PLEASE NOTE FURTHER THAT ALL BIDDERS MUST ENSURE THAT THEY ARE WELL ACQUAINTED WITH THE RIGHTS AND OBLIGATIONS OF ALL PARTIES INVOLVED IN DOING BUSINESS WITH GOVERNMENT.

NOTE: All Bidders are required to confirm (***Tick applicable box***) below:

Item	YES	NO
Is the Bidder familiar with the General Conditions of Contract prescribed by the National Treasury?		

Annexure I

Tax Compliant Status and CSD Registration Requirements

ALL PROSPECTIVE BIDDERS MUST HAVE A TAX COMPLIANT STATUS EITHER ON THE CENTRAL SUPPLIER DATABASE (CSD) OF THE NATIONAL TREASURY OR SARS E FILING PRIOR TO APPOINTMENT/AWARD OF THE BID.

REGISTRATION ON THE CSD SITE OF THE NATIONAL TREASURY IS A COMPULSORY REQUIREMENT FOR A BIDDER TO BE APPOINTED, TO CONDUCT BUSINESS WITH THE DBSA. THE ONUS IS ON THE SUCCESSFUL BIDDER TO REGISTER ON THE CSD SITE AND PROVIDE PROOF OF SUCH REGISTRATION PRIOR TO APPOINTMENT/AWARD OF THE BID.

CSD Registration Number:



The Development Bank of Southern Africa has a Zero Tolerance on Fraud and Corruption.
Report any incidents of Fraud and Corruption to Whistle Blowers on any of the following:

TollFree : 0800 20 49 33
Email : dbsa@whistleblowing.co.za
Free Post : Free Post KZN 665 | Musgrave | 4062
SMS : 33490

Appendix A: Demonstrated experience / track record in relations to Client Satisfaction, Customer Experience, Stakeholder Perception or similar research projects completed within the last five (5) years

Please complete the table below for up to three (3) relevant projects completed in the last 5 years with reference.

No.	Project Description / Scope of Work <i>[Brief description of services provided]</i>	Client	Project Duration <i>[Start & End dates]</i>	Key Outcomes / Deliverables <i>[Summary of outputs delivered]</i>	Reference letter as proof must be submitted

Appendix B: REFERENCE LETTER TEMPLATE

(To be completed by the Bidder's Client/Referee on the Client's Official Letterhead)

Reference For

Bidder Name: _____
Tender Number: _____
Tender Description: _____
Date: _____

1. CLIENT DETAILS

Client Name: _____
Physical Address: _____
Contact Person: _____
Position/Title: _____
Telephone Number: _____
Email Address: _____

2. CONTRACT INFORMATION

Contract / Project Name: _____
Description of Services Rendered: _____
Contract Start Date: _____
Contract End Date: _____
Contract Value (optional): _____

3. PERFORMANCE CONFIRMATION

- ☐ The bidder successfully performed the services described above.
- ☐ The services were delivered within agreed timeframes.
- ☐ The bidder demonstrated the necessary skills, resources and expertise.
- ☐ We would be willing to engage the bidder for similar services in future.

Additional comments:

4. VERIFICATION CONSENT AND POPIA ACKNOWLEDGEMENT

I confirm that I am authorised to provide this reference on behalf of the client organisation. I confirm that the information in this reference is true and correct.

I acknowledge that this reference may be submitted to DBSA as part of a procurement process.

I acknowledge that DBSA may process the information for reference verification, evaluation of bidder capability, procurement due diligence and governance purposes with regard to the tender referenced above.

I consent to being contacted by DBSA for verification purposes.

I acknowledge that my personal information will be processed in accordance with POPIA and solely for procurement-related purposes.

5. AUTHORISED REPRESENTATIVE

Full Name: _____
Position: _____
Signature: _____
Date: _____

Appendix C: POPIA PROCESSING NOTICE AND ACKNOWLEDGEMENT BY BIDDER

Tender Number: _____
Tender Description: _____
Bidder Name: _____
Registration Number: _____

1. PURPOSE OF THIS FORM

This form records the Bidder's acknowledgement that DBSA may collect, receive, store, use, disclose and otherwise process personal information submitted as part of a tender process for procurement administration, evaluation and contract management purposes in accordance with POPIA.

2. PERSONAL INFORMATION THAT MAY BE PROCESSED

Names, contact details, identity numbers, tax information, financial information, banking information, registration details, qualifications, reference letters, declarations, disclosures and other personal information (as defined in POPIA) submitted in support of the bid.

3. PURPOSES FOR PROCESSING

Administration of the tender process; evaluation of bids; verification of information; reference checks; due diligence; risk assessments; fraud prevention; procurement governance; contract award and administration; and compliance with legal obligations.

4. DISCLOSURE OF INFORMATION

DBSA may disclose information, where reasonably necessary, to evaluation committees, governance structures, legal advisors, auditors, regulators, service providers and other persons authorised by law.

5. WARRANTY AND INDEMNIFICATION BY THE BIDDER

The Bidder warrants that all personal information submitted to DBSA as part of its bid has been lawfully obtained and may be disclosed to DBSA for procurement, verification, evaluation, governance, audit and contract administration purposes. The Bidder indemnifies DBSA against any claim arising from the Bidder's unlawful collection, use or disclosure of personal information submitted during the tender process.

6. ACKNOWLEDGEMENT OF PROCESSING

The Bidder acknowledges and agrees that DBSA may process personal information submitted in connection with the tender process for the purposes described in this notice and in accordance with POPIA.

7. DATA SUBJECT RIGHTS

Data subjects may request access to, correction of, or deletion of personal information, where permitted by law, and may lodge complaints with the Information Regulator.

8. DECLARATION

I warrant that I am duly authorised to sign this acknowledgement on behalf of the Bidder and confirm that I have read and understood this POPIA Processing Notice and Acknowledgement.

Bidder Name: _____
Authorised Representative: _____
Position: _____
Signature: _____
Date: _____