

RFP045/2025 REQUEST FOR PROPOSAL: SOURCING OF SERVICE PROVIDER TO DEVELOP A SUSTAINABILITY & ESG FRAMEWORK & TOOLKIT FOR DBSA MUNICIPALITIES

ADDITIONAL QUESTIONS AND ANSWERS

QUESTIONS	ANSWERS
<p>1. Are there specific municipalities identified, and if so which ones and how many will be part of deliverable two (pg. 28 of the RFP)</p> <p>Is there an overarching ESG strategy or vision that this municipal level strategy / toolkit would refer to?</p>	<p>3 municipalities will be selected by DBSA for the piloting. One from each will be provided (i.e. Metro, secondary/ district, and under-resourced/local).</p> <p>Yes – needs to align to the Corporate Strategy (Integrated Municipal Approach) and the DBSA Sustainability Framework</p>
<p>2. Will you share this presentation after the meeting? so that we have it as our reference will the slides be made available to those who attend the briefing?</p>	<p>Unfortunately, we will not be sharing the recording or presentation from the meeting. This is to ensure a single, standardized source of information and to avoid any potential confusion. The official Request for Proposal (RFP) document remains the sole reference point. However, bidders are welcome to submit any additional questions or requests for clarification following the briefing session.</p>
<p>3. How do we register to show that we attended the briefing?</p>	<p>Bidders should have registered on the platform provided before joining the meeting using the briefing link on the RFP</p>
<p>4. Should B-BBEE documentation be included in Folder 1 (Technical Proposal) only, or must it also be included in Folder 2 (Financial Proposal)?</p>	<p>Folder 1_Returnable documents /technical requirements (i.e. tender document, proposal, CIPC documents, BBBEE, CSD report, TAX pin, references, Team members, organograms, CVs ,etc in files and named properly) Folder 2_ (only Annexure A-Pricing proposal/quotation)</p>
<p>5. Good morning, is there an official naming convention required for the 2 submission folders?</p>	<p>Folder 1_Technical requirements Folder 2-Pricing proposal/quotation</p>



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6. Would you like the document to be handwritten or typed?	Both handwritten and typed submissions are acceptable, provided the original content remains unchanged
7. Kindly advise if the 8 years' experience requirement is for individual the team member experts, or for the bidding advisory company itself?	<p>For technical criteria related to <i>Demonstrated track record and experience of the service provider</i>, the company itself must have >8years cumulative experience.</p> <p>For the technical criteria related to <i>Team technical experience</i>, the proposed team must have a combined amount of >8 years of technical experience.</p>
8. What is the expectation in terms of workshop duration, for all three workshops?	3-4 hours per workshop at the DBSA campus.
<p>9. What is the expectation of the Sustainability and ESG Framework ad Toolkit? Does the engagement aim to produce an automated toolkit (model) that automatically consolidates a list of material ESG related regulation/standards and weight performance based on the material impact?</p> <p>Or is the aim of the engagement to develop a separate toolkit that can be applied for specific sectors and/or regions?</p>	It is most likely the first option – service provider to refer to Terms of Reference for detail.
10. We are expected to submit the deliverable ONLY in an Excel spreadsheet? No PowerPoint or anything like that?	<p>The toolkit is excel-based.</p> <p>The Framework, findings/report, summary, methodology, approach, etc. to be delivered in PowerPoint.</p>
11. The registration link did not request organisation details.	Bidders were asked to provide their registered name in the chat during the briefing to confirm attendance and address the gap caused by the absence of a field for organisation name during registration.
12. Given that the DBSA Campus is in Midrand, should we assume that the municipalities with whom we'll be workshoping and testing the tool are Gauteng-based?	No direct interaction with the municipalities. The workshops and testing will be with DBSA.
13. How many people do you expect to be deployed in this project? and do you expect them to be fully onsite or hybrid engagement is also accepted?	Service provider to establish how many people are required to undertake the project. Service provider will only be on DBSA Campus for workshops. All other engagements deemed necessary by service provider or DBSA will be via virtual platforms.



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14. Aside from researching and obtaining data from DBSA documents (e.g., credit papers) to pilot the framework and tool, are we also required to gather, collate, and analyse any historical ESG data that DBSA may have as part of the framework development?	For the 3 municipalities that will be used to test robustness of the tool, where other historical data for the same exists, this information will be provided.
15. For the sample of municipalities on which the toolkit will be workshopped, will we be working with 2 to 3 municipalities from each of the three contexts (i.e., metropolitan, secondary, and under-resourced), or will it be 2 to 3 municipalities selected across all contexts?	One from each will be provided (i.e. Metro, secondary/ district, and under-resourced/local).
16. Kindly clarify which department or function will ultimately use and manage the Sustainability and ESG and framework toolkit?	Sustainability unit, however, the toolkit will be open to other business units to use.
17. Functional Requirements <ul style="list-style-type: none"> Should the tool be able to connect to DBSA's internal databases (e.g., financial or ESG project records) via API or other means for data aggregation? Are there any existing ESG or climate-related data points DBSA currently holds for municipalities that should be incorporated into the tool? Should the tool support comparative aggregation across municipalities, or is the intention to assess municipalities individually? 	<ul style="list-style-type: none"> No, toolkit to be done in Excel format It depends on the materiality approach taken by the service provider. 1.3. To assess municipalities individually
18. Technical Platform & Format <ul style="list-style-type: none"> While Excel is referenced in the session, would DBSA be open to a solution developed on a web-based or database-backed system (e.g. with dashboard and API functionality), provided that data exports to Excel remain available? Are there any preferred or restricted technology platforms (e.g., Excel, Power BI, SharePoint, etc.) for development and delivery? Are there any security or data residency considerations that should inform the proposed solution architecture? 	<ul style="list-style-type: none"> No, Excel-based tool is required with PowerBi compatibility for data visualization (output dashboard). Preferred: Excel and PowerBi DBSA Information Security and Privacy policies will apply and will be discussed with successful service provider at relevant point in time.
19. Pilot Scope and Use Case <ul style="list-style-type: none"> How many municipalities are intended to be included in the initial pilot across the metro, secondary, and under-resourced categories? What is the expected duration for the pilot testing phase? Should the pilot include training or onboarding sessions for municipal stakeholders, or is it for DBSA internal validation only? 	<ul style="list-style-type: none"> Three (3) municipalities - One from each will be provided (i.e. Metro, secondary/ district, and under-resourced/local). Please refer to RFP. Piloting to take place in the designated/ allocated workshop with DBSA catered for. DBSA internal validation only.



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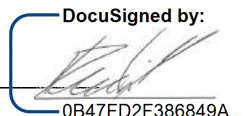
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<p>20. Post-Development Support and Scalability</p> <ul style="list-style-type: none"> • Will the selected provider be expected to offer ongoing maintenance or support beyond the six-month development period? • Should the tool be designed with future scalability in mind—e.g., integration with SAP or DBSA's investment and risk platforms? • Is DBSA open to considering a digital ESG platform approach (e.g. for centralizing data, dashboards, and updates) beyond the Excel deliverable as part of a second phase? 	<ul style="list-style-type: none"> • We expect a reasonable amount of support for any tool-related issues (i.e. technical) for at least one (1) month. • Not at this stage. The Excel-based tool can and should be integrated with SAP. • Not at this stage.
<p>21. Reporting, Dashboarding, and Standards</p> <ul style="list-style-type: none"> • Are there specific ESG reporting frameworks (e.g., ISSB S1/S2, SDGs, TCFD) that DBSA would like the tool to align with? • What is the preferred output format for dashboards and ESG ratings (e.g., Excel-based dashboards, PowerPoint summaries, interactive web dashboards)? 	<ul style="list-style-type: none"> • It depends on the materiality approach taken by the service provider. • Excel-based dashboards, PowerPoint, PowerBi.

NOTED BY:

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Simon Ludik

ACTING HEAD: SCM LENDING



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