

REQUEST FOR QUOTATION

YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED	
BID NUMBER:	RFQ059/2026
ISSUED DATE:	19 AUGUST 2026.
COMPULSORY BRIEFING SESSION	Tender briefing will be done online via Microsoft teams. Bidders are advised to use the link below to join the briefing session. Click on the link to join the meeting. Bidders must complete their details fully in order to have access to the briefing session. The link will only be accessible 15 minutes before the meeting. Compulsory Briefing Session - RFQ059.2026 Link: 31 August 2026 @13H00 PM (Johannesburg time)
CLOSING DATE:	10 September 2026.
CLOSING TIME:	23H55 (Midnight).
PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:	The tender offer validity period is 120 calendar days from the closing time for submission of Tenders. Tenderers non-acceptance of subsequent validity extensions will result in tenderers exclusion from process, whilst the process will continue to conclude
PREFERENCE POINT	80/20
DESCRIPTION OF BID:	APPOINTMENT OF A SUITABLY QUALIFIED AND EXPERIENCED SERVICE PROVIDER TO UNDERTAKE A NATIONALLY REPRESENTATIVE PERCEPTIONS SURVEY ON CLIMATE CHANGE AND THE JUST TRANSITION IN SOUTH AFRICA.
BID DOCUMENTS ELECTRONIC SUBMISSION:	1. ELECTRONIC SUBMISSIONS <u>INSTRUCTIONS:</u> ➤ Bidders are required to submit written requests for clarification via email to vusiscm@dbsa.org ONLY, quoting the RFQ Number in the subject of the e-mail. This must be done three (3) working days before submission day. ➤ Bidders will thereafter receive a OneDrive Link to upload their submission documents electronically. ➤ Written requests for clarification will be considered up to and including 04 September 2026 16:30 Johannesburg time. Requests received after this date may not be attended to. ➤ Any requests after the stipulated date and time may be disregarded.

	NB: Electronic submission is encouraged for all bidders interested in this tender Closing date of this 10/09/2026 is before 23:55. No physical bids will be received or accepted at the DBSA offices
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

**PART A
INVITATION TO BID**

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

BID NUMBER: RFQ059/2026

DESCRIPTION: APPOINTMENT OF A SUITABLY QUALIFIED AND EXPERIENCED SERVICE PROVIDER TO UNDERTAKE A NATIONALLY REPRESENTATIVE PERCEPTIONS SURVEY ON CLIMATE CHANGE AND THE JUST TRANSITION IN SOUTH AFRICA.

CLOSING DATE: 10 September 2026

CLOSING TIME: 23H55

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 Bidders 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 STATUS LEVEL SWORN AFFIDAVIT SUBMITTED? [TICK APPLICABLE BOX]	YES		NO	

IF YES, WHO ISSUED THE CERTIFICATE?				
REGISTERED WITH THE NATIONAL TREASURY CSD [TICK APPLICABLE BOX]	YES		NO	
CSD REGISTRATION NUMBER				
TAX COMPLIANCE STATUS PIN (TCS) NUMBER ISSUED BY SARS				

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.)	

PART B
TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:
1.1. BIDS MUST BE SUBMITTED ELECTRONICALLY BY THE STIPULATED TIME TO THE LINK PROVIDED. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED)
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.
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.
2. TAX COMPLIANCE REQUIREMENTS
2.1 ALL BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS IN THEIR COUNTRY OF RESIDENCE.
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.
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.
2.4 SA BIDDERS' MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.
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.
2.6 WHERE SA BIDDERS HAVE NO TCS AVAILABLE BUT ARE REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS
3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? YES ☐ YES ☐ NO
3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? YES ☐ YES ☐ NO
3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? YES ☐ YES ☐ NO
3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? YES ☐ 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 annexes 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 – 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: Form Of Offer And Acceptance (Agreement)
☐	☐	Annexure B: SBD4 Declaration of Interest
☐	☐	Annexure C: SBD 6.1 and B-BBEE status level certificate
☐	☐	Annexure D: Copies of your CIPC company registration documents listing all members with percentages, in case of a lose corporation
☐	☐	Annexure E: 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

☐☐

Annexure H: General Conditions 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 RFQ .
- 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** means the time, specified as such under the clause **Error! Reference source not found.**(Bid Timetable) in Part C, by which Tenders must be received.
- 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 in clause **Error! Reference source not found.** 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 RFQ that may be executed between the DBSA and the successful Bidder.
- 1.21 **Request for Proposal** or **RFQ** 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 RFQ 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 RFQ .
- 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 RFQ , 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:

Email: VusiSCM@dbsa.org

4. SUBMISSION OF TENDERS

TENDER SUBMISSION LINK REQUESTS: Bidders are asked to nominate one dedicated contact person (name, email address and phone number).

CLOSING DATE: **04 September 2026**

CLOSING TIME: **16H30**

5. RULES GOVERNING THIS RFQ AND THE TENDERING PROCESS

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

6. STATUS OF REQUEST FOR PROPOSAL

- 6.1 This RFQ 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 RFQ. Accordingly, this RFQ 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 QUOTATION

- 7.1 Whilst all due care has been taken in connection with the preparation of this RFQ, the DBSA makes no representations or warranties that the content in this RFQ 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 RFQ 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 RFQ 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 RFQ

- 8.1 The DBSA reserves the right to change any information in, or to issue any addendum to this RFQ 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 RFQ 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 RFQ and any other information in connection with this RFQ or the Tendering Process must keep the contents of the RFQ 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 RFQ.

11. REQUESTS FOR CLARIFICATION OR FURTHER INFORMATION

- 11.1 All communication relating to this RFQ and the Tendering Process must be directed to the Tender Officer.

- 11.2 All questions or requests for further information or clarification of this RFQ 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 Vusiscm@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 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 organization 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 Communication (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 RFQ 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 RFQ 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 RFQ . 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 RFQ 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 RFQ and any documents referenced or attached to this RFQ and any other information made or to be made available by the DBSA to Bidders in connection with this RFQ ;
- 18.1.2 fully informing themselves in relation to all matters arising from this RFQ , 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 RFQ , 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 RFQ ; 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 effect 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 Bidders 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 Bidders participation or involvement in any stage of the Tendering Process is at the Bidders 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 Bidders 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 RFQ 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 in 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 90 (Ninety) 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 not limited to;

- A. Tenderers who do not adhere to those criteria listed as 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 of the compulsory briefing session	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)
3	Standard conditions of tender as required.	48 hours	Y
4	Returnable documents completed and signed.	48 Hours	Y
5	Submission of Registration with National Treasury Central Supplier Database (CSD) Summary Report: - Bidder must be registered to do business with the DBSA.	48 hours	Y
6	A Tax Pin issued by SARS.	48 hours	Y

Only those Bidders who 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 – Price and specific goals (BBBEE).

Those bidders which have passed the first stage of the tender process will be eligible to be evaluated on the second stage, based on price, in accordance with the PPPFA regulations.

27. Risk Analysis and Objective Criteria

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 includes:

- i. Any bidder that has a cumulative order book totaling 5 Awards with outstanding value, **may be excluded from further evaluation and/or recommendation for award.**
- 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's 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 RFQ .
- 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 RFQ 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 RFQ.

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 RFQ 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 RFQ ;
- 35.1.2 it did not use the improper assistance of DBSA's 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 RFQ ; 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 RFQ , 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 proceed with, or suspend the Tendering Process prior to the execution of a formal written contract;
- 36.1.2 alter the structure and/or the timing of this RFQ or the Tendering Process;
- 36.1.3 vary or extend any time or date specified in this RFQ
- 36.1.4 terminate the participation of any Bidder or any other person in the Tendering Process;
- 36.1.5 require additional information or clarification from any Bidder or any other person;
- 36.1.6 provide additional information or clarification;
- 36.1.7 negotiate with any one or more Bidder;
- 36.1.8 call for new Bid;
- 36.1.9 reject any Bid received after the Closing Time; or
- 36.1.10 reject any Bid that does not comply with the requirements of this RFQ .

37. GOVERNING LAWS

- 37.1 This RFQ 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 SUITABLY QUALIFIED AND EXPERIENCED SERVICE PROVIDER TO UNDERTAKE A NATIONALLY REPRESENTATIVE PERCEPTIONS SURVEY ON CLIMATE CHANGE AND THE JUST TRANSITION IN SOUTH AFRICA.

1. PURPOSE

This document sets out the Terms of Reference (“ToR”) for the appointment of a suitably qualified and experienced service provider to design, update, implement, analyse, and report on a nationally representative perceptions survey on climate change and the Just Transition in South Africa. The assignment is intended to generate credible, policy-relevant evidence on public and stakeholder awareness, attitudes, concerns, trust, priorities, and expectations relating to climate action and the Just Transition.

2. INTRODUCTION

The Development Bank of Southern Africa (DBSA), in partnership with the Presidential Climate Commission (PCC), is implementing the Advancing an Inclusive Just Transition Financing Mechanism (JTfM) programme with support from the International Climate Initiative (IKI) of the Government of Germany. The JTfM seeks to accelerate South Africa’s Just Transition by strengthening institutional collaboration, mobilising investment, and supporting initiatives that promote economic diversification, climate resilience, social inclusion and sustainable livelihoods.

In 2023, the Presidential Climate Commission, with the Human Sciences Research Council, undertook South Africa’s first statistically representative survey on perceptions of climate change and the Just Transition, with findings published in 2024. This assignment will build on that work by updating the survey instrument, collecting new nationally representative data, enabling comparison over time, and generating a more nuanced understanding of perceptions across demographic, geographic, socioeconomic, labour-market, and sectoral groups.

The successful implementation of the JTfM depends on effective stakeholder engagement, strategic communication, knowledge sharing and transparent programme reporting. As the programme brings together a diverse range of public and private sector stakeholders, development partners, communities and other key role players, consistent communication and coordinated engagement are essential to foster collaboration, strengthen programme visibility, facilitate knowledge exchange and support informed decision-making.

The findings will inform policy development, implementation planning, public awareness, communication, stakeholder engagement, monitoring, evaluation and learning, and future Just Transition interventions. To support these objectives, the JTfM requires professional services to plan and coordinate programme events, stakeholder engagements and strategic communication activities,

develop high-quality communication and knowledge products, and provide reporting support for the Partnering Implementation Model (PIM). These services will contribute to effective programme implementation, strengthen stakeholder participation, enhance programme visibility, and ensure that key outcomes, lessons and progress are documented and communicated in a timely and professional manner.

The appointed service provider will be expected to conduct the assignment in a manner that is statistically credible, ethically sound, transparent, inclusive, and suitable for policy-relevant research. The survey must be designed to provide nationally representative results and, where feasible, enable disaggregation by province and other key demographic and socioeconomic variables.

The service provider will work closely with the DBSA, and relevant partners throughout the assignment, including during inception, survey instrument update, methodology confirmation, piloting, data collection, analysis, reporting, validation, and finalisation.

3. BACKGROUND

The DBSA is a South African development finance institution mandated to finance infrastructure and sustainable development that supports economic growth, regional integration and improved quality of life. The PCC is an independent multi-stakeholder advisory body that provides strategic guidance on South Africa's climate response and facilitates collaboration among government, business, labour, civil society and communities to advance an inclusive and equitable Just Transition.

South Africa is experiencing the impacts of climate change through rising temperatures, extreme weather events, droughts, floods, food insecurity, infrastructure damage, and increasing risks to livelihoods and local economies. The country is pursuing a Just Transition towards a low-carbon, climate-resilient economy and society. This transition has significant implications for households, workers, communities, industries, government, and the broader public.

Public understanding, trust, and expectations influence the effectiveness of climate action and Just Transition implementation. A perceptions survey is required to assess how different stakeholders understand climate change, how they perceive the Just Transition, what risks and opportunities they associate with it, and what support they expect from government and other stakeholders.

This survey will update and build on the previous nationally representative perceptions survey, allowing comparison of trends over time and deeper analysis of perceptions across different population groups, provinces, employment categories, income groups, education levels, settlement types, and other relevant variables. above

The study should produce a credible evidence base that clearly identifies perceptions of climate change and the Just Transition, including levels of awareness, perceived impacts, levels of support, concerns regarding social and economic implications, trust in institutions, information sources, communication needs, and practical recommendations for policy and implementation.

4. SCOPE OF WORK

The DBSA, in partnership with the PCC, intends to appoint a service provider to conduct a nationally representative perceptions survey on climate change and the Just Transition, including refining the survey design, undertaking data collection and analysis, and delivering all required outputs, such as the inception report, contextual review, survey instrument, sampling framework, fieldwork plan, dataset, analytical findings, policy and communication briefs, presentation materials, and presenting the results, in accordance with an approved methodology, timeline, and reporting framework.

4.1. Key deliverables

1. Develop an inception report setting out the refined understanding of the assignment, proposed methodology, workplan, sampling strategy, quality assurance approach, risk mitigation measures, ethical considerations, data protection measures, and approval schedule.
2. Conduct a literature and context review covering relevant findings from the previous report climate change and Just Transition commitments, policies, plans, previous perception studies, public awareness evidence, socioeconomic data, labour market information, and implications for survey design.
3. Update and finalise the existing survey instrument, including themes on climate change awareness and perceptions, perceived risks and impacts, support for climate policies, decarbonisation, renewable energy, adaptation, resilience, employment, energy security, affordability, livelihoods, poverty, inequality, trust in State and other institutions, information sources, and communication needs.
4. Design a defensible sampling framework that enables nationally representative findings and, where feasible, provincial and subgroup analysis across geography, settlement type, gender, age, race, income, education, employment status, and other relevant variables.
5. Conduct piloting, fieldworker training, data collection, data cleaning, statistical analysis, comparison with the previous survey, reporting, presentation, and final handover of anonymised data and supporting documentation.

4.2. Methodology, Survey Design and Sampling

1. Update the existing survey instrument to reflect agreed themes, policy priorities, learning from the previous survey, and findings from the literature and context review.
2. Translate the survey instrument into appropriate South African languages, where required, and ensure that interviews are conducted in a language that respondents are comfortable with.
3. Develop a statistically defensible sampling strategy, including sample size, stratification approach, substitution procedures, weighting procedures, and mechanisms for representation across key demographic and geographic groups.
4. Provide clear data quality controls, interviewer training and supervision arrangements, fieldwork monitoring procedures, informed consent procedures, confidentiality measures, and data protection protocols.

5. Pilot the survey instrument and refine the methodology, tools, language versions, and fieldwork arrangements based on feedback and approval from the commissioning institution.

4.3. Data Collection

1. Conduct data collection using the approved sampling method, survey instrument, language approach, and fieldwork plan.
2. Ensure that enumerators are trained, supervised, and monitored to maintain consistency, data quality, ethical compliance, respondent confidentiality, and appropriate handling of informed consent.
3. Apply approved substitution techniques and fieldwork controls to preserve statistical integrity and ensure adequate representation of target groups.
4. Provide regular fieldwork progress updates, including completion rates, quality issues, risks, corrective measures, and any deviations from the approved methodology.
5. Submit cleaned, anonymised, well-documented data files and data tables in formats agreed with the commissioning institution.

4.4. Data Analysis, Reporting and Knowledge Products

1. Analyse levels of awareness, understanding, concern, support, trust, perceived impacts, perceived risks and opportunities, information needs, and expectations of government and other stakeholders.
2. Disaggregate findings by relevant demographic, geographic, socioeconomic, employment, education, income, race, gender, age, settlement type, and provincial variables, subject to sample design and statistical reliability.
3. Compare the current findings with the previous survey, where comparable questions and indicators exist, to identify trends and changes in perceptions over time.
4. Produce a draft report, final report, data tables, policy and communication brief, presentation deck, and practical recommendations to inform policy, implementation, communication, stakeholder engagement, and monitoring, evaluation, and learning, including the formal presentation of final survey findings and key recommendations to the PCC and PSC.

5. DBSA ENGAGEMENT

The appointed service provider must engage with the Project Steering Committee (PSC), comprising representatives from the DBSA, PCC, and other designated members to develop a shared understanding of the following:

1. The objectives, scope, policy context, target respondents, and expected outcomes of the perceptions survey.
2. The requirements for survey design, sampling, fieldwork, translation, ethical compliance, data protection, data quality assurance, analysis, reporting, and presentation.
3. The required coordination arrangements, reporting lines, approval processes, review periods, and timelines for implementation.

4. The respective roles and responsibilities of the commissioning institution, service provider, fieldwork teams, subcontractors, and any technical advisers involved in the assignment.
5. The treatment of respondent information, survey data, consent records, datasets, fieldwork records, reports, instruments, and related documentation in line with confidentiality, ethics, and applicable data protection requirements.

5.1. Access to Information and Stakeholders:

The DBSA and PCC may, where available and deemed appropriate, facilitate access to relevant information, documentation, and stakeholder contacts to support the execution of the assignment. Such support may include, but is not limited to:

1. Previous perceptions survey instruments, reports, data tables, and related documentation, were available.
2. Relevant climate change, Just Transition, communication, stakeholder engagement, monitoring and evaluation, and policy documents.
3. Guidance on required survey themes, priority policy questions, reporting expectations, and stakeholder engagement needs.
4. Relevant socioeconomic, demographic, labour-market, sectoral, and provincial information to inform sampling and analysis.
5. Any other relevant documents deemed necessary by the commissioning institution.

The service provider will remain responsible for identifying, obtaining, validating, and analysing all information required to successfully complete the assignment.

6. EVALUATION CRITERIA

6.1. Compliance Requirements

The bidder must provide a valid proof of Professional Indemnity Insurance with a coverage value that is equal to or greater than the total value of the bidder's submitted financial offer. Documentary evidence of the Professional Indemnity Insurance or certificate confirming the level of cover must be submitted prior to appointment.

All international qualifications proposed for this assignment must be subjected to verification by the South African Qualifications Authority (SAQA) prior to any appointment being made. Bidders proposing resources with international qualifications must submit proof that the relevant qualifications have been submitted to SAQA for evaluation and verification. Such proof may include an acknowledgement of receipt, application reference number, or any other documentary evidence issued by SAQA confirming that the qualification evaluation process is underway. Failure to provide evidence of a SAQA evaluation application for international qualifications may impact the evaluation of the proposed resource and the bidder's compliance with the tender requirements.

6.2. Evaluation criteria

Only bidders who obtain a minimum score of 70 out of 100 points during the functional evaluation will proceed to the Price and Preference Points evaluation stage. The functional evaluation will be based on the criteria below.

Bidders must provide verifiable evidence, including project descriptions, reference letters, CVs, and methodology.

Table 1: Evaluation criteria

TECHNICAL SCORECARD				
No.	Evaluation Criteria	Description	Scoring Method	Max Points
1	Relevant experience in nationally representative survey research	The bidder must submit a company profile, completed Annexure A project list, and signed reference letters demonstrating successful delivery of nationally representative public opinion, perception, social research, household survey, stakeholder survey, or similar research assignments, including survey design, sampling, fieldwork, data quality assurance, analysis, and reporting. Annexure A must be followed in completing the project list	- 5 or more completed similar projects with supporting reference letters = 15; - 4 completed similar projects with supporting reference letters = 10; - 3 completed similar projects with supporting reference letters = 5; - 1 to 2 completed similar projects with supporting reference letters = 2; - No completed similar projects and/or no supporting reference letters submitted = 0	15
2	Experience in climate change, Just Transition, public policy, socioeconomic or stakeholder perception research	The bidder must submit a completed project list in accordance with Annexure A and signed reference letters or final reports demonstrating experience in conducting research assignments related to climate change, the Just Transition, public policy, socioeconomic development, labour markets, energy, public awareness, communication, or stakeholder perceptions. Bidders should demonstrate the ability to translate research findings into practical recommendations for policy development, implementation planning, public awareness, communication, stakeholder engagement, and monitoring, evaluation and learning.	- Five (5) or more completed similar projects with supporting reference letters = 20; - Three (3) to Four (4) completed projects with supporting reference letters = 15; - One (1) to Two (2) completed similar projects with supporting letters = 8; - No relevant experience or insufficient evidence. Including reference letters = 0	20

		Annexure A must be followed in completing the project list.		
3	Methodology, workplan and implementation approach	A detailed methodology demonstrating the following: 1. Clear understanding of the assignment, policy context, research objectives, target population, and expected outputs = 5; 2. Robust survey design approach, including questionnaire update, translation, piloting, and approval process = 5; 3. Statistically defensible sampling strategy, including sample size, stratification, substitution, weighting, and disaggregation approach = 5; 4. Fieldwork implementation plan, including enumerator training, supervision, data quality controls, ethics, informed consent, confidentiality, and data protection = 5; 5. Analysis, reporting, presentations, risk management, workplan, quality assurance, and stakeholder review approach = 5; 6. Capacity to deliver multilingual survey implementation across South Africa's 12 official languages, with appropriate translation, localisation, and quality control processes to ensure accuracy and consistency = 5	- Each element carries a maximum score of 5 points. The score awarded will be multiplied by the applicable weighting as follows: - 0.5 = Element addressed in a generic, vague, or unclear manner. - 1.0 = Element clearly, adequately, and comprehensively addressed. - Final Score per Element = Points Awarded × Applicable Weighting.	30
4	Project Team and Key Personnel	The bidder must submit CVs using Annexure B and proof of relevant qualifications and experience for the proposed personnel. The proposed team must include appropriate expertise in survey research, sampling and statistics, fieldwork management, data analysis, climate change or Just Transition policy, ethics, data protection, and reporting. All international qualifications proposed for this assignment must be subjected to verification by the South African Qualifications Authority (SAQA) prior to	a) Project Director / Survey Team Leader (6 points): - Holds a minimum NQF Level 9 qualification in Statistics, Economics, Development Studies, Public Policy, Social Research, Climate Change Studies or related field, with 8 or more years' experience leading nationally representative surveys or similar research assignments = 6; - Holds a minimum NQF Level 8 qualification and 5 to 7 years' experience	20

		any appointment being made. Bidders proposing resources with international qualifications must submit proof that the relevant qualifications have been submitted to SAQA for evaluation and verification. Such proof may include an acknowledgement of receipt, application reference number, or any other documentary evidence issued by SAQA confirming that the qualification evaluation process is underway. Failure to provide evidence of a SAQA evaluation application for international qualifications may impact the evaluation of the proposed resource and the bidder's compliance with the tender requirements. Annexure B must be followed in completing the CV Template	leading similar assignments = 4; - Less than 5 years' experience or does not meet qualification requirements = 0. b) Sampling / Statistician Specialist (4 points): - Holds a minimum NQF Level 8 qualification in Statistics, Mathematical Statistics, Data Science, Demography, Economics or related quantitative field, with 5 or more years' experience in survey sampling, weighting and statistical analysis = 4; - 3 to 4 years' experience = 2; - Less than 3 years' experience or does not meet qualification requirements = 0. c) Fieldwork Manager / Survey Operations Specialist (4 points): - Holds a minimum NQF Level 8 qualification in Social Sciences, Development Studies, Public Administration, Monitoring and Evaluation or related field, with 5 or more years' experience managing survey fieldwork and quality control = 4; - 3 to 4 years' experience = 2; - Less than 3 years' experience or does not meet qualification requirements = 0. d) Data Analyst / Report Writer / Policy Specialist (6 points): - Holds a minimum NQF Level 8 qualification in Economics, Statistics, Development Studies, Public Policy, Climate Change Studies, Sociology or related field, with 5 or more years' experience in	
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			survey data analysis and research reporting = 6; - 3 to 4 years' experience = 3; - Less than 3 years' experience or does not meet qualification requirements = 0.	
5	Data analysis, reporting and knowledge products capability Reporting and Knowledge Management Capability	Demonstrated experience in producing cleaned and quality-assured datasets, data tables, statistical analyses, analytical reports, policy and communication briefs (including audience-specific language and messaging approaches), presentation materials, and evidence-based recommendations to support policy development, implementation, stakeholder engagement, and decision-making.	- Submitted 5 or more samples (e.g., reports, dashboards, infographics, or similar outputs) demonstrate a strong ability to analyse data, present findings clearly, draw evidence-based conclusions, and provide practical recommendations for policy, programme design, stakeholder engagement, or decision-making = 15; - Submitted 3 to 4 samples (e.g., reports, dashboards, infographics, or similar outputs) demonstrate an adequate ability to analyse data and present findings, with limited evidence of actionable recommendations or policy application = 10; - Submitted 1 to 2 samples (e.g., reports, dashboards, infographics, or similar outputs) demonstrate limited analytical depth, weak presentation of findings, or limited practical application of results = 5; - No relevant samples (e.g., reports, dashboards, infographics, or similar outputs) submitted = 0.	15
Total				100
Minimum threshold for technical evaluation				70

7. COMPETENCIES

The following competencies for the service provider and team members are expected:

- Demonstrable experience in nationally representative public opinion, perception, social research, or survey research assignments.
- Strong capability in survey design, questionnaire development, translation, sampling, fieldwork management, data quality assurance, and statistical analysis.
- Experience analysing and reporting on climate change, Just Transition, socioeconomic, labour-market, public policy, communication, or stakeholder perception themes.
- Proven ability to produce high-quality analytical reports, data tables, policy briefs, communication briefs, presentations, and knowledge products.
- Experience managing ethical approval or ethical compliance processes, informed consent, respondent confidentiality, anonymisation, and personal information protection.
- Ability to meet deadlines, maintain quality, manage fieldwork risks, and communicate progress clearly throughout the assignment.

8. DELIVERABLES AND TIMEFRAMES

The service provider will complete the assignment within 16 to 32 weeks of appointment, subject to Project Steering Committee (PSC) approval of the inception report, sampling approach, fieldwork schedule, review periods, and reporting requirements. The final handover package must include approved reports, presentations and supporting materials, survey instruments, fieldwork records, anonymised datasets, data tables, codebooks, consent and ethics documentation, and analysis outputs.

Table 2: Deliverables and timelines

Deliverable	Description	Indicative Timeline
Inception Report	Refined understanding of the assignment, methodology, workplan, sampling strategy, quality assurance plan, risk register, ethical considerations, data protection measures, and approval schedule.	Weeks 1–3
Literature and Context Review	Review of relevant climate change and Just Transition policies, commitments, previous studies, awareness evidence, socioeconomic and labour-market data, and implications for survey design.	Weeks 2–5
Survey Instrument and Sampling Framework	Final questionnaire, language/translation approach, sampling design, weighting approach, fieldwork procedures, pilot plan, and data quality controls.	Weeks 4–8
Data Collection and Fieldwork Progress Updates Reports and Knowledge Products	- Completed fieldwork, regular progress updates, quality assurance records, fieldwork monitoring outputs, and issue-resolution logs. - Periodic progress reports, stakeholder engagement reports, workshop reports, synthesis reports, lessons learnt reports, and other knowledge products.	Weeks 10–18

Draft Report and Data Tables	Cleaned and anonymised dataset, data tables, analysis outputs, and draft analytical report for review and comment.	Weeks 18–24
Final Close-Out and Handover Report, Brief and Presentation	Final analytical project report incorporating feedback, policy and stakeholder databases, attendance registers, communication brief, presentation deck, and final recommendations materials, engagement records, lessons log, action tracker, and all supporting project documentation.	Weeks 24–32

9. REMUNERATION SCHEDULE

Payments for services rendered under this TOR will be made in South African Rand on a fixed-price basis, subject to Project Steering Committee approval of completed deliverables and milestones.

1. Only bidders who meet and pass Step(s) 1 and 2 above will proceed to this phase: the Price Proposal.
2. Price proposals will be scrutinized to verify the absence of arithmetical errors, omissions, and inconsistencies. Bidders will be notified of all errors or omissions that are identified in the tender offer and either confirm the bid offer as tendered or accept the corrected total of prices.
3. Bidders are kindly cautioned that the pricing proposal should be submitted in A SEPARATE FOLDER clearly marked “pricing proposal”. The proposal should not be combined with any of the other submissions, including the resource matrix, CVs, project reference list, methodology and approach proposal because these qualitative and other criteria are sought to be assessed independently of the pricing proposal.

BIDDERS WHO FAIL TO SUBMIT THEIR PRICING PROPOSAL IN A SEPARATE FOLDER MAY FACE DISQUALIFICATION FROM THE PROCESS.

This assignment will be a fixed-price contract, notwithstanding that cost components may be based on hourly rates. Accordingly, the service provider is required to propose pricing on a lump sum basis, broken down by stages (detailed in Table above). The pricing per stage must be split per deliverable in that stage.

A comprehensive rate card must be included covering all categories of resources proposed for the project, including specialists and any other relevant expertise. In addition, bidders must submit for each deliverable: Resource(s), Rate per resource, Hours required and Total cost.

The scope of work will require the successful bidder to travel or engage key stakeholders of the project. Therefore, the price offer should be all-inclusive.

All prices and rates should include associated disbursements and exclude VAT. Bidders must account for discounts and inflation in their pricing, as no price escalation will be permitted during implementation. All rates agreed with shall be fixed and final. Bidders must ensure that all disbursements are accurately priced and clearly itemised in their submissions. Any omission, understatement, overstatement, or incorrect pricing of disbursements shall be at the bidder's risk and

may not constitute grounds for a claim for additional compensation after contract award. The Total tendered amount at the bottom shall include 15% VAT.

Should bidders require any additional information to complete their quotations, all queries must be submitted via email. Responses to such queries will be provided in writing and copies of replies will be circulated to all bidders to ensure fairness and transparency.

Milestone	Deliverable(s)	Payment (%)	Bid Price (ZAR)
1	Inception Report	10%	
2	Literature Review, Survey Instrument and Sampling Framework	20%	
3	Fieldwork, Data Collection and Quality Assurance	35%	
4	Draft Report, Data Tables and Analysis Outputs	20%	
5	Final Report, Brief, Presentation and Handover Package	15%	
Sub total			
VAT 15%			
Total		100%	

Payments: Payments will comprise professional fees and approved disbursements per deliverable or milestone, subject to Project Steering Committee approval. The quoted price must be inclusive of all costs required to deliver the economic complexity and socio-economic analysis assignment, including professional fees, data acquisition where required, travel and subsistence, stakeholder engagement costs, analysis, reporting, validation workshops, and any other related costs.

13. GOVERNING LAW

This consultancy contract shall be governed by and interpreted in accordance with the substantive laws of South Africa.

14. CONFIDENTIALITY

Any confidential information obtained by either party to this project, or arising from the implementation of this project, shall be treated as confidential by the party receiving it and shall not be used, divulged, or permitted to be divulged to any person not being a party to this project, without the prior written consent of the other party.

The service provider must manage all respondent information, survey data, consent records, fieldwork records, datasets, reports, instruments, contact information, and related documentation in accordance with applicable South African data protection requirements, including the Protection of Personal Information Act. Personal information may only be collected, stored, processed, shared, or used for

purposes approved by the commissioning institution, and all confidential information must be returned or securely disposed of at close-out as directed.

Annexure A

FORM OFFER AND ACCEPTANCE (AGREEMENT)

(Note: This page must be separated from the pre-qualifying and functional proposal. Failure to separate this, will lead to disqualification of the bid)

THE CONSULTANT IS TO COMPLETE AND SIGN THE FORM OF OFFER

The Employer, identified in the Acceptance signature block, has solicited offers to enter into a contract in respect of the following services:

RFQ059.2026 - APPOINTMENT OF A SUITABLY QUALIFIED AND EXPERIENCED SERVICE PROVIDER TO UNDERTAKE A NATIONALLY REPRESENTATIVE PERCEPTIONS SURVEY ON CLIMATE CHANGE AND THE JUST TRANSITION IN SOUTH AFRICA.

The Tenderer, identified in the Offer signature block below, has examined the documents listed in the Tender Data and addenda thereto as listed in the Tender Schedules, and by submitting this Offer has accepted the Conditions of Tender.

By the representative of the Tenderer, deemed to be duly authorised, signing this part of this Form of Offer and Acceptance, the Tenderer offers to perform all of the obligations and liabilities of the consultant under the Contract including compliance with all its terms and conditions according to their true intent and meaning for an amount to be determined in accordance with the Conditions of Contract identified in the Contract Data.

THE OFFERED TOTAL OF THE PRICES INCLUSIVE OF ALL TAXES IS

	(in words);	ZAR	(in figures),
_____		_____	

This offer may be accepted by the Employer by signing the Acceptance part of this Form of Offer and Acceptance and returning one copy of this document to the Tenderer before the end of the period of validity stated in the Tender Data, whereupon the Tenderer becomes the party named as the consultant in the Conditions of Contract identified in the Contract Data.

Signature(s)

Name(s)

Capacity

For the
Tenderer

(Name and address of organisation)

Name and
signature of
witness

Date

Annexure A

Price proposal

(Note: This page must be separated from the pre-qualifying and functional proposal. Failure to separate this, will lead to disqualification of the bid)

Payments for services rendered under this TOR will be made in South African Rand on a fixed-price basis, subject to Project Steering Committee approval of completed deliverables and milestones.

1. Only bidders who meet and pass Step(s) 1 and 2 above will proceed to this phase: the Price Proposal.
2. Price proposals will be scrutinized to verify the absence of arithmetical errors, omissions, and inconsistencies. Bidders will be notified of all errors or omissions that are identified in the tender offer and either confirm the bid offer as tendered or accept the corrected total of prices.
3. Bidders are kindly cautioned that the pricing proposal should be submitted in A SEPARATE FOLDER clearly marked "pricing proposal". The proposal should not be combined with any of the other submissions, including the resource matrix, CVs, project reference list, methodology and approach proposal because these qualitative and other criteria are sought to be assessed independently of the pricing proposal.

BIDDERS WHO FAIL TO SUBMIT THEIR PRICING PROPOSAL IN A SEPARATE FOLDER MAY FACE DISQUALIFICATION FROM THE PROCESS.

This assignment will be a fixed-price contract, notwithstanding that cost components may be based on hourly rates. Accordingly, the service provider is required to propose pricing on a lump sum basis, broken down by stages (detailed in Table above). The pricing per stage must be split per deliverable in that stage.

A comprehensive rate card must be included covering all categories of resources proposed for the project, including specialists and any other relevant expertise. In addition, bidders must submit for each deliverable: Resource(s), Rate per resource, Hours required and Total cost.

The scope of work will require the successful bidder to travel or engage key stakeholders of the project. Therefore, the price offer should be all-inclusive.

All prices and rates should include associated disbursements and exclude VAT. Bidders must account for discounts and inflation in their pricing, as no price escalation will be permitted during implementation. All rates agreed with shall be fixed and final. Bidders must ensure that all disbursements are accurately priced and clearly itemised in their submissions. Any omission, understatement, overstatement, or incorrect pricing of disbursements shall be at the bidder's risk and may not constitute grounds for a claim for additional compensation after contract award. The Total tendered amount at the bottom shall include 15% VAT.

Should bidders require any additional information to complete their quotations, all queries must be submitted via email. Responses to such queries will be provided in writing and copies of replies will be circulated to all bidders to ensure fairness and transparency.

Milestone	Deliverable(s)	Payment (%)	Bid Price (ZAR)
1	Inception Report	10%	
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3	Fieldwork, Data Collection and Quality Assurance	35%	
4	Draft Report, Data Tables and Analysis Outputs	20%	
5	Final Report, Brief, Presentation and Handover Package	15%	
Sub total			
VAT 15%			
Total		100%	

Payments: Payments will comprise professional fees and approved disbursements per deliverable or milestone, subject to Project Steering Committee approval. The quoted price must be inclusive of all costs required to deliver the economic complexity and socio-economic analysis assignment, including professional fees, data acquisition where required, travel and subsistence, stakeholder engagement costs, analysis, reporting, validation workshops, and any other related costs.

ANNEXURE A: COMPANY EXPERIENCE AND TRACK RECORD

No.	Client Name	Project/Assignment Title	Nature of Assignment	Country	Year Completed	Duration	Reference Provided (Yes/No)

[Note to the Bidder: The Bidder may provide this information in a separate page provided it includes the information required per the template and it is clearly marked that it's responding to the Technical Evaluation Criteria.]

ANNEXURE B: KEY PERSONNEL

No.	Name of Resource	Role in Assignment	Highest Qualification	Years of Relevant Experience	Details of experience

[Note to the Bidder: The Bidder may provide this information in a separate page provided it includes the information required per the template and it is clearly marked that it's responding to the Technical Evaluation Criteria.]

ANNEXURE B: STANDARD CV TEMPLATE

CV Template		
Proposed resource Information		
Proposed Position as per the TOR		
Name of the Firm		
Date of Employment		
Name of the staff member		
Date of birth		
Nationality		
Education		
Date Obtained	Institution	Degrees Obtained and National Qualification Level

Experience				
Employment History Date	Position Held	Company Name	Detail description in line with the criteria	Sector Experience

Project list for projects undertaken

Key Projects Undertaken 1	
Name of the Assignment/Project	
Period in full dates	
Location	
Client	
Sector	
Positions Held	
Project Value in ZAR	
Activities Performed	
Key Deliverables	
Contactable reference: Name and contacts	
Key Projects Undertaken 2	
Name of the Assignment/Project	
Period in full dates	
Location	
Client	
Sector	
Positions Held	
Project Value in ZAR	
Activities Performed	
Key Deliverables	
Contactable reference: Name and contacts	

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder's declaration

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

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

Full Name	Identity Number	Name of State institution

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

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

2.2.1 If so, furnish particulars:

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any

interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....

3 DECLARATION

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

- 3.1** I have read and I understand the contents of this disclosure;
- 3.2** I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;
- 3.3** The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However, communication between partners in a joint venture or consortium² will not be construed as collusive bidding.
- 3.4** In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.
- 3.4** The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

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

- 3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 3.6 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

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

.....
Signature Date

.....
Position Name of bidder

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

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

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

1. GENERAL CONDITIONS

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

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

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **80/20** preference point system.

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
SPECIFIC GOALS (BBBEE)	20

- 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 AND PREFERENCE

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

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

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right) \quad \text{or} \quad P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

80/20 or 90/10

Where

- P_s = Points scored for price of tender under consideration
- P_t = Price of tender under consideration
- P_{min} = 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 AND SPECIFIC GOALS

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

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

Where

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

4. POINTS AWARDED FOR SPECIFIC GOALS

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

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

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

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

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (90/10 system) (To be completed by the tenderer)	Number of points claimed (80/20 system) (To be completed by the tenderer)
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	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). 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.	Yes ☐	No ☐
4.1.1	If so, furnish particulars:		
4.2	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)? 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.	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, 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 copies of the latest share certificates of all relevant companies and or Beneficiaries disclosure form.

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.

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 ACQUINTED 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