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DBSA
DEVELOPMENT BANK OF SOUTHERN AFRICA
Building Africa's Prosperity

RFP196/2026: QUESTION AND ANSWERS_ APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER TO CONDUCT DBSA ANNUAL CLIENT SATISFACTION SURVEYS

QUESTIONS AND ANSWERS

No	DBSA RFP094/2026 - Clarification Questions	DBSA Response
1.	Q1. Under the Project Team and Resources evaluation criterion (page 43), DBSA awards full marks for a team of up to three experts. Does this mean that bidders may propose three senior professionals responsible for leading the assignment, while also including additional staff to undertake activities such as survey programming, data collection, data processing and quality assurance? Or would these additional staff be counted towards the three-person limit and potentially reduce the score?	The Project Team and Resources criterion is intended to assess the qualifications and experience of the key personnel proposed to lead and deliver the assignment. Bidders may include additional personnel to support activities such as survey programming, data collection, data processing, quality assurance and project administration. These supporting resources should be clearly reflected in the proposed methodology and resource plan. The evaluation of this criterion will be based on the key experts presented in response to the functionality requirements.
2.	Q2. Previous survey instruments and historical data Given that DBSA conducts its Client Satisfaction Survey annually, will the appointed service provider be given access to previous survey questionnaires, methodologies, datasets and reports? Is the expectation to retain and refine the existing survey instrument to ensure comparability and longitudinal trend analysis, or to develop a new instrument from the outset?	Relevant historical information may be made available to the successful service provider during project initiation, subject to DBSA's data governance, confidentiality and information security requirements. The successful bidder will be expected to consider historical comparability while proposing enhancements that strengthen the robustness and usefulness of the survey methodology and outputs.

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3.	Q3. Client database and sampling frame • Will DBSA provide the appointed service provider with a comprehensive client contact database for survey administration? If so, could DBSA clarify: • The approximate number of clients and contacts included; • How recently the database was updated; • Whether both email addresses and telephone numbers will be available; • Whether the database distinguishes between current, former and prospective clients and identifies their respective business units; and Whether multiple respondents may be surveyed within the same client organisation?	DBSA will provide the successful service provider with the information reasonably required to execute the survey, subject to applicable confidentiality, information security and data governance requirements. Bidders are required to propose a statistically sound sampling methodology capable of achieving the confidence levels, margin of error and response rate requirements specified in the TOR.
4.	Q4. Number of survey waves and pricing expectations The Terms of Reference refer to annual Client Satisfaction Surveys for the 2026/27 and 2027/28 financial years, alongside ongoing implementation support and quarterly feedback mechanisms. Could DBSA clarify whether bidders are expected to cost for two complete annual survey cycles, including questionnaire development, fieldwork, analysis and reporting for each year, or for one full survey cycle followed by implementation support and monitoring in the second year?	The contract comprises two phases. **Year 1** focuses on the full Client Satisfaction Survey programme, including survey design, fieldwork, analysis, reporting and dashboard development. **Year 2** focuses on implementation support, monitoring, advisory services, dashboard updates, impact assessment and related activities as specified in the TOR. Bidders should submit pricing in accordance with the activities and deliverables outlined in the TOR and Annexure A.
5.	Q5. Quarterly pulse surveys • Are the quarterly pulse surveys intended to be separate data collection exercises involving	As stipulated in the TOR, the appointed service provider will be expected to incorporate and analyse insights from quarterly pulse and

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	DBSA clients, or will they rely on feedback collected through existing DBSA channels? If separate surveys are required, how many waves should bidders provide for in their costing?	transactional feedback mechanisms as part of the broader Voice of Customer programme. Bidders should propose an appropriate approach for meeting this requirement within their methodology and pricing submission.
6	**Client population and database** Could DBSA please provide an indication of the total number of clients to be included in the survey, ideally broken down by current, former and prospective clients? Will DBSA provide the successful service provider with an existing client contact database, including relevant contact details?	The number of clients is approximately 26. The successful service provider will be provided with the information reasonably required to implement the approved survey methodology, subject to DBSA's data governance, confidentiality, and information security requirements. Bidders are required to propose a sampling approach capable of achieving the confidence levels and response-rate targets specified in the TOR.
7	**Client segmentation** How does DBSA currently segment its client base (e.g. business unit, client type, sector, product, transaction value or other classifications)? Is an existing client segmentation framework available that should inform the survey methodology?	The TOR requires analysis of client feedback across relevant client categories and business dimensions. Bidders are expected to propose an appropriate segmentation methodology as part of their technical proposal. Any existing segmentation information required for implementation will be shared with the successful bidder during project inception.
8	**Geographic coverage** What proportion of DBSA's client base is located within South Africa versus other African countries? Could DBSA indicate which countries are represented and whether any specific language, regional sampling or in-country research requirements should be accommodated?	The study is expected to cover DBSA's client base as defined in the TOR. Bidders should propose a methodology capable of accommodating the geographic distribution of respondents and ensuring representative coverage where applicable.
9	**Respondent profiles**	The target population comprises DBSA clients and relevant client contacts as defined by the client

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	Can DBSA confirm whether the survey population comprises institutional and organisational clients only, or whether individual beneficiaries, end-users or other stakeholder categories should also be included? Where an institutional client has multiple DBSA engagements, should more than one respondent be surveyed?	database provided for the study. The appointed service provider should propose an approach that ensures feedback is obtained from appropriate client representatives.
10	**Sampling and response-rate expectations** The RFP specifies a 95% confidence level, a margin of error of ±5%, and a targeted response rate of 50–60%. Could DBSA clarify whether the 50–60% response-rate requirement applies to the total eligible client population or to the selected survey sample? Is a census of all eligible clients expected, or may the service provider propose a statistically representative sample?	Bidders may propose a statistically sound sampling methodology that achieves the minimum requirements specified in the TOR, namely a 95% confidence level, a margin of error not exceeding ±5% and a targeted response rate of 50–60%. The methodology should clearly demonstrate how these requirements will be achieved.
11	**Previous client satisfaction surveys** Could DBSA make available the previous survey questionnaire, methodology, achieved sample sizes, response rates and headline results (including CSAT, NPS, CES and TGW, where applicable)? Additionally, should the proposed methodology retain comparability with previous survey cycles, or is DBSA open to establishing a revised measurement framework and baseline?	Relevant historical information may be made available to the successful service provider during project initiation, subject to DBSA data governance requirements. The appointed service provider will be expected to consider historical comparability while proposing appropriate methodological enhancements that strengthen the quality and usefulness of insights generated through the study.
12	**Existing CSAT instrument and measurement framework** Does DBSA currently have an established CSAT questionnaire and measurement framework? If so, will	DBSA has undertaken client satisfaction surveys previously. However, the appointed service provider will be responsible for the review, design and implementation of the survey methodology,

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	the existing questionnaire and associated methodology be shared with the successful service provider, and to what extent should these be retained for historical comparability versus evolved?	questionnaire framework and measurement approach. Existing instruments and relevant background information may be made available to the successful bidder during project initiation to support continuity and trend analysis where appropriate. The service provider is expected to apply professional judgement in balancing historical comparability with methodological enhancement.
13	**Historical data** What historical CSAT data will be made available to the appointed service provider to allow for historical trend comparability, and for how many previous waves? Will this include respondent-level datasets, questionnaires, code frames, weighting/calculation approaches and historical reports?	Relevant historical information necessary to support trend analysis and continuity of measurement may be made available to the successful service provider, subject to DBSA data governance, confidentiality and information security requirements. The extent of information shared will be determined during project initiation
14	**Corporate Balanced Scorecard (BSC)** Is the Client Satisfaction indicator within the Corporate Balanced Scorecard already defined? If so, will DBSA provide the existing indicator definition, calculation methodology, weighting, target and historical results to ensure consistent calculation and reporting?	The Client Satisfaction Survey supports DBSA's Corporate Balanced Scorecard reporting requirements. Relevant BSC information required for the successful execution of the assignment will be provided to the appointed service provider during the inception phase
15	**Client segmentation** Does DBSA have an existing client segmentation framework that the study should align to, or is the appointed service provider expected to develop a new segmentation model? Please also clarify whether "client segmentation" refers to analysis by predefined DBSA segments or the development of a data-driven/statistical segmentation.	The service provider is expected to analyse results across relevant client characteristics and business dimensions and may recommend additional segmentation approaches where these support deeper insight generation. The proposed methodology should clearly articulate the segmentation approach to be applied.

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16	**Benchmarking** Please clarify the intended scope of the benchmarking requirement. Is DBSA expecting benchmarking against its own historical performance, relevant external CX norms, comparable development finance institutions/infrastructure financiers, or a combination thereof? Which specific measures are expected to be benchmarked?	As stated in the TOR, benchmarking should be undertaken **where feasible**. This may include comparison with DBSA historical performance, relevant development finance institutions, public sector financial institutions, infrastructure financiers and recognised customer experience benchmarks. The bidder should propose an appropriate benchmarking approach within its methodology
17	**Eligible client population / sampling universe** Approximately how many eligible clients from the previous financial year are expected to be included on the client list provided to the appointed service provider, both overall and by major division, client segment and geography?	The successful service provider will be provided with the information required to develop and implement an appropriate sampling framework. Bidders are required to propose a statistically sound sampling methodology capable of achieving the confidence levels and response-rate targets specified in the TOR.
18	**Statistical precision and subgroup requirements** Does the requirement for 95% confidence and a maximum ±5% margin of error apply to the total achieved sample only, or are minimum sample sizes/statistical precision requirements also expected at divisional, client segment or geographic level?	The TOR requires the survey methodology to achieve a minimum 95% confidence level and a margin of error not exceeding ±5% for overall survey results. Bidders should propose an approach that enables meaningful analysis across key client segments and dimensions identified in the TOR.
19	**Historical data-collection methodology** What data-collection methodology was used in previous CSAT surveys (digital only, hybrid mix of digital and traditional (CATI or F2F), traditional only, etc.), and to what extent should the appointed service provider retain this methodology to protect historical trend comparability?	The successful service provider may be provided with information on previous survey approaches to support understanding of historical measurements. However, the TOR requires bidders to propose a hybrid methodology that delivers reliable, representative and actionable insights aligned to current requirements.

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20	**Power BI dashboard and access** Given that DBSA currently uses Microsoft Power BI, will the interactive dashboard be required to reside within DBSA's existing Microsoft environment, and will DBSA provide the necessary Power BI licences and user access? Approximately how many internal and/or external users are expected to require dashboard access?	The TOR requires the development of an interactive dashboard using Microsoft Power BI or an equivalent platform approved by DBSA and compatible with the DBSA Microsoft technology environment. Detailed implementation arrangements, including user access requirements, will be finalised with the appointed service provider.
21	**Data governance, hosting and security** Please confirm the data-processing, data-residency, information-security and access requirements applicable to the DBSA client contact database and to any third-party survey, data-processing or dashboard platforms used by the appointed service provider.	The appointed service provider will be required to comply with all applicable legislation and governance requirements, including POPIA, PAIA, the Electronic Communications and Transactions Act, the Cybercrimes Act and DBSA information security, data governance and confidentiality requirements as detailed in the TOR.
22	**Two-year survey and implementation scope** Please confirm whether a full Client Satisfaction Survey is required in both contract years, with Year 2 additionally incorporating the implementation-planning workshops, quarterly engagements, impact assessment, dashboard updates and monitoring activities described in the TOR.	Yes, the assignment comprises two phases: • **Year 1:** Full Client Satisfaction Survey design, fieldwork, analysis, reporting and dashboard development. • **Year 2:** Implementation support, monitoring, advisory services, dashboard updates, progress reviews and impact assessment activities as outlined in the TOR. Bidders should price and plan for both phases accordingly.

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23	**Quarterly pulse and transactional surveys** Please clarify what quarterly pulse and transactional survey programmes are currently in place (if any), including their methodology, frequency and measures. Is the appointed service provider expected only to integrate and analyse the outputs from these existing surveys, or also to design, administer and/or evolve these surveys as part of the broader VoC programme?	The TOR requires the appointed service provider to incorporate insights from internal quarterly pulse and transactional surveys and to consolidate and analyse these trends as part of ongoing client experience monitoring. Bidders may propose approaches that strengthen DBSA's Voice of Customer capability and continuous feedback processes.
24	**Clarification on implantation support required** Please confirm whether the "implementation support" required following completion of the CSAT and action-planning phase is intended to comprise advisory support, facilitation, implementation planning, progress monitoring and impact assessment, or whether DBSA expects the appointed service provider to directly deliver improvement initiatives identified through the research.	Implementation support is intended to comprise advisory support, facilitation, implementation planning, prioritisation workshops, progress monitoring, dashboard updates, review sessions and impact assessment activities as outlined in the TOR. DBSA does not expect the service provider to directly implement operational improvement initiatives arising from the research findings.
25	**Unforeseen technology or operational requirements** Where identified initiatives require technology implementation, system integration, specialist delivery or significant operational/process changes that cannot reasonably be defined prior to completion of the research and action-planning phase, can these initiatives be separately scoped and priced?	The scope and pricing requirements are limited to the activities described in the TOR. Any additional services falling materially outside the defined scope would be subject to DBSA's applicable governance and procurement processes.

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26	**Implementation support and root cause analysis** The TOR references implementation support and root cause analysis. Please clarify the specific activities expected under this workstream. Does this include stakeholder workshops, action planning, process reviews, operational diagnostics, change management support and/or programme governance?	The TOR envisages implementation support activities that include interpretation of findings, workshops, stakeholder engagement, prioritisation of improvement actions, advisory support, implementation monitoring and impact assessment. Root cause analysis should inform recommendations and improvement planning where required.
27	**Impact assessment** Please clarify the intended scope of the impact assessment. What specific outcomes or success measures is DBSA expecting to assess, and will this require a repeat measurement of customer satisfaction following the implementation of improvement initiatives?	The impact assessment should evaluate progress against baseline survey findings, implementation status of agreed actions, lessons learned, performance improvements and recommendations for subsequent survey cycles. The methodology for conducting the impact assessment should be proposed by the bidder.
28	With regards to the attached RFP we are responding to, please could you provide some clarification regarding below. Does this refer to directors/trustees/shareholders having an interest in other enterprises registered on the CSD database?	Please receive the correct SBD4 to utilize which will be shared with all prospective bidders. In response to the below query, (clause 2.2 on the attached) the declaration is not for only companies registered on the Central Supplier Database, but rather to all entities registered via CIPC/Trusts, etc

NOTED BY:

Signed by:
Mpumelelo Nhlangulela
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HEAD: SCM LENDING

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