

REQUEST FOR QUOTATION

YOU ARE HEREBY INVITED TO SUBMIT WRITTEN PRICE QUOTATIONS FOR THE REQUIREMENTS OF THE POSTBANK SOC LIMITED

REQUEST FOR QUOTATION (RFQ) NUMBER:	RFQ No. 19/2026 (Please use this number as reference when sending quotations and supporting documentation)
DESCRIPTION	Procurement of Customer Experience Survey Services for three (03) months
RFQ ISSUED DATE	31 July 2026
RFQ VALIDITY PERIOD	60 days from the closing date.
CLOSING DATE AND TIME	Date: 07 August 2026 Time: 11:00 am (South African Time)
OFFICE ADDRESS	National Postal Centre (NPC) Cnr 497 Sophie de Bruyn & Jeff Masemola Streets Pretoria 0002
RFQ RESPONSES MUST BE EMAILED TO:	Quotations should be emailed to: rfq.procurementvm@postbank.co.za Failure to follow these instructions will result in your quote not being considered.
ENQUIRIES REGARDING THIS RFQ SHOULD BE SUBMITTED VIA E-MAIL TO	Enquires can be directed at this e-mail address Vusi.Maditsi@postbank.co.za . rfq.procurementvm@postbank.co.za

Important Notes to this RFQ:

Bidders /suppliers should ensure that RFQ responses are emailed to the correct email address, (rfq.procurementvm@postbank.co.za) and (Vusi.Maditsi@postbank.co.za)

- If the quotation is late, it shall not be accepted for consideration.
- The Postbank reception is generally accessible 8 hours a day (07h30 to 16h00); 5 days a week (Monday to Friday) for delivery of goods.
- Bidders /Supplier to complete and sign all Annexures to this document (including Standard Bidding Document)
- Supplier must ensure compliance with their tax obligations

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SERVICE PROVIDER/SUPPLIER:

REGISTRATION NUMBER:

CSD UNIQUE SUPPLIER REGISTRATION NUMBER:

ADDRESS:

CONTACT PERSON:

EMAIL:

TEL:

- (I) Postbanks standard conditions of purchase shall apply.
- (II) Late submissions will not be accepted.
- (III) The recommended service provider/supplier will be required to complete and sign the Standard Bidding Documents (SBD) and Annexures. All Bidders /suppliers must adhere to the General Conditions of Contract as prescribed by National Treasury.
- (IV) It is the responsibility of the service provider/supplier to ensure that the Postbank has updated information on the status of their business.
- (V) No goods or services shall be delivered before the issuing of an official Postbank's Award Letter or Purchase Order (PO) signed by the authorised Postbank official. The Postbank reserves the right not to make payment or accept the goods or services should the goods or services be delivered to the Postbank before the Postbank Award Letter or PO is issued.
- (VI) Please note that RFQ responses should be sent to email address mentioned on the cover page of the RFQ document, failure to do so, it shall not be accepted for consideration.
- (VII) Bidders /suppliers are required to be registered on the Central Supplier Database (CSD).
- (VIII) Postbank reserves the right to cancel or reject any quote and not to award the RFQ to the lowest bidder or award parts of the RFQ to different bidders, or not to award the RFQ at all
- (IX) Postbank reserves the right to procure commodities from more than one service provider depending on the stock and/or service availability.

I, the undersigned (NAME).....certify that :

I have read and understood the conditions of this RFQ;

I have supplied the required information and the information submitted as part of this RFQ is true and correct.

1. BACKGROUND

Postbank SOC Ltd invites suitably qualified and experienced Customer Experience (CX) research and analytics service providers to submit quotations for the design, execution, analysis, and reporting of Customer Experience Surveys focused on Individual Customers and Stokvels for a period of three (3) months.

2. PURPOSE

The purpose of this RFQ is to appoint a service provider capable of delivering a structured, reliable, and compliant end-to-end Customer Experience measurement programme to:

- Measure customer satisfaction, loyalty, and effort
- Identify drivers of positive and negative experiences
- Embed customer feedback into operational, product, and strategic decision-making
- Support service improvement, trust-building, and customer retention

3. BACKGROUND & STRATEGIC CONTEXT

Postbank serves a diverse customer base, with Individual customers and Stokvels forming a critical part of South Africa's inclusive financial ecosystem. In support of its developmental and customer-centric mandate, Postbank seeks to:

- Deepen trust and long-term relationships with Individual customers
- Strengthen value propositions tailored to Stokvels and community-based savings groups
- Institutionalise the voice of the customer across all levels of the organisation

To achieve this, the Bank requires a POPIA-compliant Customer Experience measurement programme that provides actionable, timely, and decision-ready insights across key journeys and channels, including branch and assisted service environments.

4. OBJECTIVES

The appointed service provider must deliver an end-to-end CX solution that:

- Measures Net Promoter Score (NPS), Customer Satisfaction (CSAT), and Customer Effort Score (CES)
- Captures experiences across priority journeys for Individuals and Stokvels
- Identifies key drivers of satisfaction, dissatisfaction, loyalty, and attrition
- Enables closed-loop feedback and service recovery
- Produces clear, role-based reporting to inform business action

5. SCOPE OF SERVICES

5.1 Target Population:

The scope is limited executively to:

- Individual (Retail) Customers
- Stokvels, including savings groups, burial societies, investment Stokvels, and rotating credit associations
- No corporate, commercial, or institutional segments are in scope.

5.2 Survey Design & Methodology

The service provider must:

- **Design CX survey instruments tailored separately for:**
 - Individual customers
 - Stokvel decision-makers, signatories, and members
- **Measure:**
 - NPS
 - CSAT
 - CES
 - Core experience drivers (e.g. trust, ease, fairness, reliability)
- **Support:**
 - Transactional surveys
 - Relationship surveys
 - Ad hoc surveys (as required)
 - Ensure all surveys are available in all 11 official South African languages
 - Apply sampling methodologies appropriate to both Individuals and group-based Stokvel structures

5.3 Data Collection Channels

Data collection must include a mix of:

- SMS-to-web surveys
- Email surveys (where applicable)
- Telephonic / CATI surveys (assisted, where required)
- Branch-based or journey-triggered surveys (e.g. onboarding, servicing, complaints)

The provider must recommend channels that are accessible, cost-effective, and appropriate to customers with limited digital literacy.

5.4 Analytics, Reporting & Insights

The service provider must deliver:

- Quantitative analysis of NPS, CSAT, CES, and related metrics
- Qualitative analysis of open-ended feedback
- Identification of key experience drivers for Individuals and Stokvels
- Trend and comparative analysis (Individuals vs Stokvels)
- Clear, action-oriented insight summaries with recommendations

5.5 Dashboards & Closed-Loop Feedback

- Secure, role-based dashboards (Executive, Operations, Branch, CX)
- Real-time or near real-time reporting
- Alerts and case management for detractor feedback
- Support for service recovery and customer follow-up

- Knowledge transfer and training for Postbank users

5.6 Compliance & Data Security

- Full compliance with POPIA
- Secure handling of all personal and Stokvel data
- Data residency within South Africa (preferred)
- All data, tools, and insights remain the property of Postbank

6. SPECIAL CONDITIONS OF CONTRACT

- Award is subject to Postbank's internal governance and procurement approvals
- The service provider must demonstrate experience in South African retail banking or financial services, including Stokvel or community-based models
- The Bank reserves the right to pilot the solution prior to full rollout
- All deliverables produced under this contract will be owned by Postbank
- Multilingual and culturally appropriate engagement is mandatory

7. CONTRACT DURATION & COMMENCEMENT

- Contract period: Three (3) months
- The successful bidder must be ready to commence within 1–2 working days of award

8. SUBMISSION REQUIREMENTS

- Completed and signed RFQ response
- All mandatory and functional evidence
- Pricing annexure
- Valid tax clearance and company registration documents

9. CONFIDENTIALITY

All information contained in this RFQ is confidential and may not be disclosed without prior written consent from Postbank SOC Ltd.

1. EVALUATION PROCESS

The bid will be evaluated in two (2) phases, namely:

- **Phase 1: Mandatory Requirements Criteria** - Only bidders that have complied with the Mandatory criteria will be evaluated on functionality requirements
- **Phase 2: Functionality Requirements** – Bidder must obtain a minimum of 70 points out of 100 points to qualify for further evaluation.
- **Phase 3: Price and Specific Goals (80/20)**

1.1 Phase 1: Mandatory Requirements (Comply / Do not comply)

- i. Failure to meet any mandatory requirement will result in disqualification.

Mandatory Requirements	Comply	Do not comply
Company Experience Minimum 5 years' experience in CX research – provide company profile		
Reference letters The bidder must provide a minimum of 3 signed reference letters with contactable references where CX Score and NPS were rendered in the last 5 years. The date of the letter must not be older than 1 year from the bid issue date. The reference letters must be on client letterheads and specify services provided and should include the following: • Company Name • Company Contact details • Description of services rendered • Period/Duration of the project		
POPIA compliance (statement/policy)		

1.2 Phase 2: Functionality Requirements – Bidder must obtain a minimum of **70 points out of 100 points** to qualify for further evaluation.

II. Minimum qualifying score: **70/100**

Functional Criteria	Mandatory Evidence	Points
TECHNICAL PRODUCTION CAPABILITY CX Survey Design & Methodology (NPS, CSAT, CES): The bidder must provide a portfolio of evidence which includes at least 2 case studies where detailed CX Survey Design & Methodology (NPS, CSAT, CES) were delivered. Examples for each of the following must be provided, with links or files clearly referenced: - NPS Surveys and measured - Customer Satisfaction Measurements and Industry Benchmarking	Portfolio of Evidence / example of previous work	- More than 2 case studies of detailed CX design & methodology (NPS, CSAT, CES) = 50 Points 2 case studies of detailed CX design & methodology (NPS, CSAT, CES) = 35 Points 0 case studies = 0 points
Analytics, Reporting & Insight Capability: Provide at least two examples of case studies where analytics, reporting and insight capability were provided.	Portfolio of Evidence / example of previous work	More than 2 examples of case studies of Analytics, Reporting & Insight Capability = 25 points 2 examples of case studies of Analytics, Reporting & Insight Capability = 15 points 0 examples of case studies of Analytics, Reporting & Insight Capability = 0 points
Team Capacity Team Experience & Capacity (minimum 5 years)	Provide 3 CVs of team	3 CVs / Professional profiles = 25 points 2 CVs / professional profiles = 15 points 1 CV / professional profile or less = 0 points
TOTAL		100

1.3 Phase 3: PRICE AND SPECIFIC GOALS (80/20)

Commercial - Price (80) and Specific Goals (20) Evaluation

EVALUATION CRITERIA		POINTS
4.2.1	PRICE	80
4.2.2	SPECIFIC GOALS	20
	Specific Goals points allocation:	
	• Historically Disadvantaged Individuals/Company (51% and above)	8
	• Women (51% and above)	7
	• Disability (51% and above)	5
NB: it is upon the bidder to provide supporting document for the points claimed.		

1. The bidders must submit a full, itemized cost breakdown (VAT inclusive), covering the end-to-end provisioning of the Survey and presentation of the results, Benchmarked – including the outlined services below.
2. All prices must be VAT inclusive (if VAT registered) and must be quoted in South African Rand (ZAR);
3. No price changes will be accepted after official Purchase Order (PO)/Award Letter is issued.

Note: Pricing must be quoted in South African Rand (ZAR) and submitted as a separate annexure on company letterhead.

#	Item	VAT Exclusive	VAT Inclusive
1.	End to end provisioning of the Survey and presentation of the results, Benchmarked		
	a) Survey design & setup		
	b) Data collection (per channel / per response)		
	c) Translations		
	d) Dashboards and reporting		
	e) Analytics & Insight reporting		
	f) Closed-loop feedback management		
Total exclusive of VAT			
VAT calculated at 15%			
Total inclusive of VAT			

The Service Provider warrants that the pricing quoted above is free of any errors and omissions and that the service will be executed at the price quoted.

Bidder's Name:

Signature:

Date:

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

- 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

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.

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.
- 3.5 The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
- 1.6 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.
- 1.7 I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act 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

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.

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 90/10 preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the 90/10 or 80/20 preference point system will be applicable in this tender. The lowest/highest acceptable tender will be used to determine the accurate system once tenders are received.

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

- (a) Price; and
- (b) Specific Goals.

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	20
Total points for Price and SPECIFIC GOALS	100

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) “**tender**” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “**price**” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “**rand value**” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “**tender for income-generating contracts**” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “**the Act**” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULA FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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:

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. FORMULA FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

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

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

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 (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Historically Disadvantaged individuals/Companies (51% and above)	8	
Women (51% and above)	7	
Disabled (51% and above)	5	

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:	
	
	
	

Annex G : GENERAL CONDITIONS OF CONTRACT AND STANDARD BIDDING DOCUMENTS

1. Bidders are required to complete and sign all Standard Bidding Documents (SBDs) and Annexures. All Bidders /suppliers must adhere to the General Conditions of Contract as prescribed by National Treasury.

Detailed information on the General Condition of Contract are found in the link below:

http://ocpo.treasury.gov.za/Resource_Centre/Legislation/General%20Conditions%20of%20Contract-%20Inclusion%20of%20par%2034%20CIBD.pdf