REQUEST FOR PROPOSALS

YOU ARE HEREBY INVITED TO SUBMIT A BID TO MEET THE REQUIREMENTS OF THE DEVELOPMENT BANK OF SOUTHERN AFRICA LIMITED	
BID NUMBER:	**RFP210/2026**
COMPULSORY BRIEFING SESSION DETAILS:	**Compulsory Briefing Session Registration Link**
CLOSING DATE:	**Friday, 04 December 2026**
CLOSING TIME:	23H55 (Midnight)
PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE:	120 days *Bids must remain valid for 120 calendar days from the closing time for submission. Bidders who do not accept a subsequent validity extension will be excluded from further consideration, while the procurement process continues.*
DESCRIPTION OF BID:	**Integrated Digital Marketing and Development Partner**
BID DOCUMENTS ELECTRONIC SUBMISSION:	**ELECTRONIC SUBMISSIONS** **INSTRUCTIONS:** • Bidders are required to submit written requests for clarification via e-m **davidscm@dbsa.org** **ONLY**, quoting the RFP Number in the subjec Requests for clarification and submission links must be made three (3) w days before the bid closing date. • Bidders will thereafter receive a OneDrive Link to upload their subm documents electronically. • Written requests for clarification will be considered up to and includi **November 2026 16:30** Johannesburg time. Requests received after this 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 RFP210/2026 is 2026 before 23:55PM.** **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

Table of Contents

PART A **3**
PART B **6**
PART C **7**
PART D **8**
1. PURPOSE ..... Error! Bookmark not defined.
2. OBJECTIVES ..... Error! Bookmark not defined.
3. SCOPE OF WORK ..... Error! Bookmark not defined.
4. ROLES AND RESPONSIBILITIES ..... Error! Bookmark not defined.
5. METHODOLOGY & STANDARD ..... Error! Bookmark not defined.
6. PRICING & CONTRACTING APPROACH ..... Error! Bookmark not defined.
8 EXPECTED DELIVERABLES, OUTPUTS AND TIMELINES ... Error! Bookmark not defined.
9 COMPETENCY AND EXPERTISE REQUIREMENTS OF RESOURCES ..... Error! Bookmark not defined.
10. PROJECT REPORTING ARRANGEMENTS ..... Error! Bookmark not defined.
Annexure B **73**
Annexure C **76**
80/20 or 90/10 ..... **78**
80/20 or 90/10 ..... **78**
Annexure D **83**
Annexure E **84**
Annexure F **85**
Annexure G **86**
Annexure H **87**
Annexure I **88**

PART A
INVITATION TO BID

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

BID NUMBER: **RFP210/2026**

DESCRIPTION:

COMPULSORY BRIEFING: **Monday, 23 November 2026**

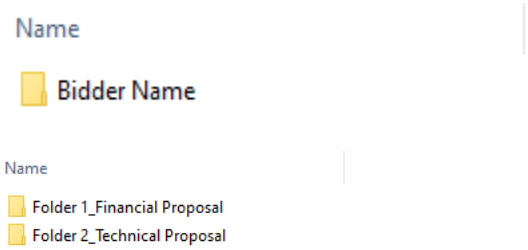
COMPULSORY BRIEFING LINK

Time: 10H00 AM Johannesburg time **(Microsoft Teams)**

Closing time for the OneDrive Link submissions **– 04 December 2026**

CLOSING DATE: **04 December 2026**

CLOSING TIME: 23H55PM



a) Bidders are responsible for uploading the correct bid documents using the submission link for this tender.

b) If a system issue prevents submission, the bidder must provide sufficient evidence of the upload attempt before the closing time, including the error received.

c) Only electronic bids submitted through the provided link will be accepted. Bids submitted by fax or email will not be accepted.

d) Bidders are responsible for requesting a submission link to participate in this tender.

e) DBSA accepts no responsibility for an incorrect designated email address or technical difficulties, including problems with the bidder's computer, network or internet service provider (ISP).

BID SUBMISSION LINK REQUESTS:

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

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

THE FOLLOWING PARTICULARS MUST BE FURNISHED (FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED). BIDDERS THAT ARE UNINCORPORATED CONSORTIA CONSISTING OF MORE THAN ONE LEGAL ENTITY MUST SELECT A LEAD ENTITY AND FURNISH THE DETAILS OF THE LEAD ENTITY, UNLESS OTHERWISE SPECIFIED.				
NAME OF BIDDER AND EACH ENTITY IN CONSORTIUM:				
POSTAL ADDRESS:				
STREET ADDRESS:				
CONTACT PERSON (FULL NAME):				
EMAIL ADDRESS:				
TELEPHONE NUMBER:				
FAX NUMBER:				
BIDDER REGISTRATION NUMBER OR REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM				
BIDDER VAT REGISTRATION NUMBER OR VAT REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM				
BBBEE STATUS LEVEL VERIFICATION CERTIFICATE /BBBEE STATUS LEVEL SWORN AFFIDAVIT SUBMITTED?	**YES**		**NO**	

1..1.1	ARE YOU THE ACCREDITED REPRESENTATIVE **IN SOUTH AFRICA FOR THE GOODS /SERVICES/WORKS OFFERED?**	☐Yes ☐No [IF YES ENCLOSE PROOF]
1..1.2	ARE YOU A FOREIGN BASED SUPPLIER FOR **THE GOODS /SERVICES/WORKS OFFERED?**	☐Yes ☐No [IF YES ANSWER PART B:3 BELOW]
1..1.3	**SIGNATURE OF BIDDER**	
1..1.4	**DATE**	
1..1.5	**FULL NAME OF AUTHORISED REPRESENTATIVE**	
1..1.6	**CAPACITY UNDER WHICH THIS BID IS SIGNED (Attach proof of authority to sign this bid; e.g. resolution of directors, etc.)**	

[TICK APPLICABLE BOX]				
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				

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 ☐ NO
3.2.	DOES THE BIDDER HAVE A BRANCH IN THE RSA? ☐ YES ☐ NO
3.3.	DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? ☐ YES ☐ NO
3.4.	DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? ☐ YES ☐ NO
IF THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN, IT IS NOT A REQUIREMENT TO OBTAIN A TAX COMPLIANCE STATUS / TAX COMPLIANCE SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 ABOVE.	

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

PART C

CHECKLIST OF COMPULSORY RETURNABLE SCHEDULES AND DOCUMENTS

Please adhere to the following instructions:

- Tick in the relevant block below;
- Ensure that the following documents are completed and signed where applicable; and
- Use the prescribed sequence in attaching the 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 in separate folders; Folder 1 - for Pre-Qualifying Criteria and Functional Evaluation and Folder 2 - Price / Financial Proposal – Electronic submission
☐	☐	**Part A:** Invitation to Bid
☐	☐	**Part B:** Terms and Conditions of Bidding
☐	☐	**Part C:** Checklist of Compulsory Returnable Schedules and Documents
☐	☐	**Part D:** Conditions of Tendering and Undertakings by Bidders
☐	☐	**Part E:** Specifications/Terms of Reference and Project Brief
☐	☐	**Annexure A:** Price Proposal Requirement
☐	☐	**Annexure B:** SBD4 Declaration of Interest
☐	☐	**Annexure C:** SBD6.1 and B-BBEE status level certificate
☐	☐	**Annexure F:** Certified copies of your CIPC company registration documents listing all members with percentages, in case of a lose corporation
☐	☐	**Annexure G:** Certified copies of latest share certificates, in case of a company.

☐ ☐ **Annexure H: (if applicable):** A breakdown of how fees and work will be spread between members of the bidding consortium.

☐ ☐ **Annexure I:** Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria.

☐ ☐ **Annexure J:** General Condition of Contract

☐ ☐ **Annexure K:** CSD Tax Compliance Status and Registration Requirements Report

PART D

CONDITIONS OF TENDERING AND UNDERTAKINGS BY BIDDER

1. DEFINITIONS

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

1.1 **B-BBEE** means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act, 2003;

1.2 **B-BBEE Act** means the Broad-Based Black Economic Empowerment Act, 2003;

1.3 **B-BBEE status level of contributor** means the B-BBEE status received by a measured entity based on its overall performance used to claim points in terms of regulation 6 and 7 of the Preferential Procurement Regulations,2022.

1.4 **Business Day** means a day which is not a Saturday, Sunday or public holiday in South Africa.

1.5 **Bid** means a written offer in the prescribed or stipulated form lodged by a Bidder in response to an invitation in this Request for Proposal, containing an offer to provide goods, works or services in accordance with the Specification as provided in this RFP.

1.6 **Bidder** means a person or legal entity, or an unincorporated group of persons or legal entities that submit a Bid.

1.7 **Companies Act** means the Companies Act, 2008.

1.8 **Compulsory Documents** means the list of compulsory schedules and documents set out in Part C.

1.9 **Closing Time** for the OneDrive Link submissions - 23h55 on the 31 January 2025 (Telkom Time)

1.10 **DBSA** means the Development Bank of Southern Africa Limited.

1.11 **DFI** means Development Finance Institution.

1.12 **Evaluation Criteria** means the criteria set out under the clause 26 (Evaluation Process) of this Part C, which includes the Qualifying Criteria, Functional Criteria and Price and Preferential Points Assessment (where applicable).

1.13 **Functional Criteria** means the criteria set out in clause 27 of this Part D.

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 26.1.1 of this Part D.

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 RFP that may be executed between the DBSA and the successful Bidder.

1.21 **Request for Proposal** or **RFP** means this document (comprising each of the parts identified under Part A, Part B, Part C, Part D and Part E) including all annexures and any other documents so designated by the DBSA.

1.22 **SARS** means the South African Revenue Service.

1.23 **Services** means the services required by the DBSA, as specified in this RFP Part E.

1.24 **SLA** means Service Level Agreement.

1.25 **SOE** means State Owned Enterprise, as defined by the Companies' Act.

1.26 **Specification** means the conditions of tender set and any specification or description of the DBSA's requirements contained in this RFP.

1.27 **State** means the Republic of South Africa.

1.28 **Statement of Compliance** means the statement forming part of a Tender indicating the Bidders compliance with the Specification.

1.29 **Tendering Process** means the process commenced by the issuing of this Request for Proposals and concluding upon formal announcement by the DBSA of the selection of a successful Bidder(s) or upon the earlier termination of the process.

1.30 **Website** means a website administered by DBSA under its name with web address **www.dbsa.org**

2. INTERPRETATIONS

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

2.1 "includes" or "including" means includes or including without limitation; and

2.2 "R" or "Rand" is a reference to the lawful currency of the Republic of South Africa.

3. TENDER TECHNICAL AND GENERAL QUERIES

Queries pertaining to this tender must be directed to:-

DBSA Supply Chain Management Unit

Email: **davidscm@dbsa.org**

No questions will be answered telephonically.

4. SUBMISSION OF TENDERS

COMPULSORY BRIEFING: Refer to the cover page for the link to register and attend the briefing session meeting.

Time: 10H00 AM Johannesburg time **(Microsoft Teams)**

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

CLOSING DATE:	**04 December 2026**
CLOSING TIME:	23H55PM

5. RULES GOVERNING THIS RFP AND THE TENDERING PROCESS

5.1 Participation in the tender process is subject to compliance with the rules contained in this RFP Part D.

5.2 All persons (whether a participant in this tender process or not) having obtained or received this RFP may only use it, and the information contained herein, in compliance with the rules contained in this RFP.

5.3 All Bidders are deemed to accept the rules contained in this RFP Part D.

5.4 The rules contained in this RFP Part D apply to:

5.4.1 The RFP and any other information given, received or made available in connection with this RFP, and any revisions or annexure.

5.4.2 the Tendering Process; and

5.4.3 any communications (including any briefings, presentations, meetings and negotiations) relating to the RFP or the Tendering Process.

6. STATUS OF REQUEST FOR PROPOSAL

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

7. ACCURACY OF REQUEST FOR PROPOSAL

7.1 Whilst all due care has been taken in connection with the preparation of this RFP, the DBSA makes no representations or warranties that the content in this RFP or any information communicated to or provided to Bidders during the Tendering Process is, or will be, accurate, current or complete. The DBSA, and its officers, employees and advisors will not be liable with respect to any information communicated which is not accurate, current or complete.

7.2 If a Bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this RFP or any other information provided by the DBSA (other than minor clerical matters), the Bidder must promptly notify the DBSA in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the DBSA an opportunity to consider what corrective action is necessary (if any).

7.3 Any actual discrepancy, ambiguity, error or inconsistency in this RFP or any other information provided by the DBSA will, if possible, be corrected and provided to all Bidders without attribution to the Bidder who provided the written notice.

8. ADDITIONS AND AMENDMENTS TO THE RFP

8.1 The DBSA reserves the right to change any information in, or to issue any addendum to this RFP before the Closing Time. The DBSA and its officers, employees and advisors will not be liable in connection with either the exercise of, or failure to exercise this right.

8.2 If the DBSA exercises its right to change information in terms of clause 8.1, it may seek amended Tenders from all Bidders.

9. REPRESENTATIONS

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

10. CONFIDENTIALITY

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

11. REQUESTS FOR CLARIFICATION OR FURTHER INFORMATION

11.1 All communications relating to this RFP and the Tendering Process must be directed to the Tender Officer.

11.2 All questions or requests for further information or clarification of this RFP or any other document issued in connection with the Tendering Process must be submitted to the Tender Officer in writing, and most preferably by e-mail to davidscm@dbsa.org

11.3 Any communication by a Bidder to the DBSA will be effective upon receipt by the Tender Officer (provided such communication is in the required format).

11.4 The DBSA has restricted the period during which it will accept questions or requests for further information or clarification and reserves the right not to respond to any enquiry or request, irrespective of when such enquiry or request is received.

11.5 Except where the DBSA is of the opinion that issues raised apply only to an individual Bidder, questions submitted and answers provided will be made available to all Bidders by e-mail, as well as on the DBSA's website without identifying the person or organisation which submitted the question.

11.6 In all other instances, the DBSA may directly provide any written notification or response to a Bidder by email to the address of the Bidder (as notified by the Bidder to the Tender Manager).

11.7 A Bidder may, by notifying the Tender Officer in writing, withdraw a question submitted in accordance with clause 11.2, in circumstances where the Bidder does not wish the DBSA to publish its response to the question to all Bidders.

12. UNAUTHORISED COMMUNICATIONS

12.1 Communications (including promotional or advertising activities) with staff of the DBSA or their advisors assisting with the Tendering Process are not permitted during the Tendering Process, or otherwise with the prior consent of the Tender Officer. Nothing in this clause 12 is intended to prevent communications with staff of, or advisors to, the DBSA to the extent that such communications do not relate to this RFP or the Tendering Process.

12.2 Bidders must not otherwise engage in any activities that may be perceived as, or that may have the effect of, influencing the outcomes of the Tendering Process in any way.

13. IMPROPER ASSISTANCE, FRAUD AND CORRUPTION

13.1 Bidders may not seek or obtain the assistance of employees of the DBSA in the preparation of their tender responses.

13.2 The DBSA may in its absolute discretion, immediately disqualify a Bidder that it believes has sought or obtained such improper assistance.

13.3 Bidders are to be familiar with the implications of contravening the Prevention and Combating of Corrupt Activities Act, 2004 and any other relevant legislation.

14. ANTI-COMPETITIVE CONDUCT

14.1 Bidders and their respective officers, employees, agents and advisors must not engage in any collusion, anti-competitive conduct or any other similar conduct in respect of this Tendering Process with any other Bidder or any other person(s) in relation to:

14.1.1 the preparation or lodgement of their Bid

14.1.2 the evaluation and clarification of their Bid; and

14.1.3 the conduct of negotiations with the DBSA.

14.2 For the purposes of this clause 14, collusion, anti-competitive conduct or any other similar conduct may include disclosure, exchange and clarification of information whether or not such information is confidential to the DBSA or any other Bidder or any other person or organisation.

14.3 In addition to any other remedies available to it under law or contract, the DBSA may, in its absolute discretion, immediately disqualify a Bidder that it believes has engaged in any collusive, anti-competitive conduct or any other similar conduct during or before the Tendering Process.

15. COMPLAINTS ABOUT THE TENDERING PROCESS

15.1 Any complaint about the RFP or the Tendering Process must be submitted to the Supply Chain Management Unit in writing, by email, immediately upon the cause of the complaint arising or becoming known to the Bidder, (**tenders@dbsa.org**)

15.2 The written complaint must set out:

15.2.1 the basis for the complaint, specifying the issues involved;

15.2.2 how the subject of the complaint affects the organisation or person making the complaint;

15.2.3 any relevant background information; and

15.2.4 the outcome desired by the person or organisation making the complaint.

15.3 If the matter relates to the conduct of an employee of the DBSA, the complaint should be addressed in writing marked for the attention of the Chief Executive Officer of the DBSA, and delivered to the physical address of the DBSA, as notified.

16. CONFLICT OF INTEREST

16.1 A Bidder must not, and must ensure that its officers, employees, agents and advisors do not place themselves in a position that may give rise to actual, potential or perceived conflict of interest between the interests of the DBSA and the Bidder's interests during the Tender Process.

16.2 The Bidder is required to provide details of any interests, relationships or clients which may or do give rise to a conflict of interest in relation to the supply of the services under any contract that may result from this RFP. If the Bidder submits its Bid and a subsequent conflict of interest arises, or is likely to arise, which was not disclosed in the Bid, the Bidder must notify the DBSA immediately in writing of that conflict.

16.3 The DBSA may immediately disqualify a Bidder from the Tendering Process if the Bidder fails to notify the DBSA of the conflict as required.

17. LATE BIDS

17.1 Bids must be delivered by the Closing Time. The Closing Time may be extended by the DBSA in its absolute discretion by providing written notice to Bidders.

17.2 Bids delivered after the Closing Time or lodged at a location or in a manner that is contrary to that specified in this RFP will be disqualified from the Tendering Process and will be ineligible for consideration. However, a late Bid may be accepted where the Bidder can clearly demonstrate (to the satisfaction of the DBSA, in its sole discretion) that late lodgement of the Bid was caused by the DBSA; that access was denied or hindered in relation to the physical

tender box; or that a major/critical incident hindered the delivery of the Bid and, in all cases, that the integrity of the Tendering Process will not be compromised by accepting a Bid after the Closing Time.

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

18. BIDDER'S RESPONSIBILITIES

18.1 Bidders are responsible for:

18.1.1 examining this RFP and any documents referenced or attached to this RFP and any other information made or to be made available by the DBSA to Bidders in connection with this RFP;

18.1.2 fully informing themselves in relation to all matters arising from this RFP, including all matters regarding the DBSA's requirements for the provision of the Services;

18.1.3 ensuring that their Bids are accurate and complete;

18.1.4 making their own enquiries and assessing all risks regarding this RFP, and fully considering and incorporating the impact of any known and unknown risks into their Bid;

18.1.5 ensuring that they comply with all applicable laws in regard to the Tendering Process particularly as specified by National Treasury Regulations, Guidelines, Instruction Notes and Practice Notes and other relevant legislation as published from time to time in the Government Gazette; and

18.1.6 submitting all Compulsory Documents.

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

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

applicable notices published by the Department of Trade and Industry in the Government Gazette.

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

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

19. PREPARATION OF BIDS

19.1 Bidders must ensure that:

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

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

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

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

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

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

20. ILLEGIBLE CONTENT, ALTERATION AND ERASURES

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

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

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

23. DISCLOSURE OF BID CONTENTS AND BID INFORMATION

23.1 All Bids received by the DBSA will be treated as confidential. The DBSA will not disclose contents of any Bid and Bid information, except:

23.1.1 as required by law;

23.1.2 for the purpose of investigations by other government authorities having relevant jurisdiction;

23.1.3 to external consultants and advisors of the DBSA engaged to assist with the Tendering Process; or for the general information of Bidders required to be disclosed as per National Treasury Regulations, Guidelines, Instruction Notes or Practice Notes.

24. USE OF BIDS

24.1 Upon submission in accordance with the requirements relating to the submission of Bids, all Bids submitted become the property of the DBSA. Bidders will retain all ownership rights 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 120 (one-hundred and twenty) days from the Closing Time. This period may be extended by written mutual agreement between the DBSA and the Bidder.

26. EVALUATION PROCESS

26.1 The Bids will be evaluated and adjudicated as follows:

26.1.1 First Stage – Test for administrative Responsiveness

The test for administrative responsiveness will include the following:

Stage 1: Responsiveness

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

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

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

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

	Responsiveness Criteria	Clarification Time	Applicable to this Tender (Y/N)
1	Standard conditions of tender as required.	48 hours	Y
2	Returnable documents completed and signed.	48 hours	Y
3	Submission of Proof of Registration with National Treasury Central Supplier Database (CSD) Summary Report or A Valid and Active Tax Compliance Status Pin issued by SARS for Tax Compliance Status Verification: N.B - Bidder must be fully registered & tax compliant to do business with the DBSA.	7 Working days	Y

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

Eligibility criteria

Bidders must demonstrate access to suitably qualified and experienced personnel who can deliver the services in these Terms of Reference (TOR). The proposed team must have the skills, experience and qualifications required for the roles specified below.

Bidding entity experience and recent work

The bidding entity must have at least seven (7) years' operational experience. This requirement establishes organisational stability, operational maturity and the capacity to support a multi-year contract. Individual team members' experience will be assessed separately under the relevant resource and technical evaluation criteria and cannot replace the entity's minimum operational experience.

Reference letters and case studies must relate to work performed within the last three (3) years. This requirement complements the seven-year operational requirement: the latter addresses the entity's maturity and stability, while recent references and case studies demonstrate relevant experience in current digital marketing, performance marketing, content, media, AI and technology practices.

Documentation for proposed personnel

To be considered responsive and eligible for the next evaluation stage, bidders must submit the following documents for each proposed resource:

- A detailed curriculum vitae (CV) clearly outlining the individual's qualifications, relevant professional experience and role on similar projects or campaigns; and
- Copies of academic qualifications and/or relevant professional certifications, as specified for the respective role.

Each CV must demonstrate that the proposed resource meets or exceeds the minimum experience requirements in the table below. It should specify the individual's roles, responsibilities and duration of involvement in relevant projects, particularly in digital marketing strategy, campaign execution, media optimisation, lead generation, CRM and marketing automation integration, and AI-enabled marketing tools, where applicable.

Individuals proposed for multiple roles

Proposing one individual for more than one role, such as Creative Director and Content Writer, is not automatically disallowed. Where this arrangement is proposed, the bidder must explain:

- The roles the individual will perform and their relevant qualifications and experience for each role;
- The time allocated to each role;
- How workload conflicts will be managed;
- How continuity and quality will be maintained; and
- How the DBSA account will receive the required level of dedicated support.

DBSA will assess whether the arrangement is practical and provides sufficient capacity to deliver the required scope.

Availability, verification and compliance

Bidders must ensure that proposed personnel will be available and committed to the project if appointed. During evaluation, DBSA may request clarification, additional documentation or verification of qualifications and experience.

Failure to submit the required documents for any proposed resource may result in the bid being declared non-responsive and excluded from further evaluation.

All proposed resources must meet or exceed the minimum experience and qualification requirements set out in the table below.

Role	Minimum experience	Minimum qualification
Account Director / Strategic Lead	10+ years in integrated marketing within public sector, financial services or regulated environments	Bachelor's degree in Marketing, Communications, Business or related field
Digital Strategy Lead	6+ years in digital strategy and integrated campaign planning	Bachelor's degree in Marketing, Digital Marketing or related field
Media Buying & Performance Specialist	8+ years managing paid digital campaigns	Relevant degree or recognised digital marketing certification (e.g. Google Ads, Meta, programmatic platforms)

Role	Minimum experience	Minimum qualification
Creative Director	8+ years in creative direction within agency or institutional environments	Degree or diploma in Creative Design, Visual Communication or related field
Content Lead / Senior Copywriter	5+ years in content development, preferably within development, financial or corporate sectors	Degree in Communications, Journalism, Marketing or related field
AI Marketing Strategist	5+ years applying AI and data-driven technologies in marketing strategy, including campaign optimisation, automation and analytics	Bachelor's degree in Marketing, Data Science, Artificial Intelligence, Digital Marketing, Computer Science or related field
AI Marketing Specialist	2+ years supporting AI-powered marketing tools, including generative AI, automation platforms and analytics tools	Relevant degree, diploma or recognised certification in Digital Marketing, Artificial Intelligence, Data Analytics, Computer Science or related field
Multimedia Graphic & Digital Designer	8+ years in digital and campaign design	Degree or diploma in Graphic Design, Visual Communication or related field
Web Developer / UX Specialist	8+ years in web development and UX design	Degree or diploma in Web Development, Computer Science or related field
Analytics & Reporting Specialist	8+ years in digital analytics and reporting	Degree in Data Analytics, Marketing Analytics, Statistics or related field

Role	Minimum experience	Minimum qualification
MarTech and CRM Integration Specialist	5+ years integrating digital marketing platforms, websites and campaign environments with an enterprise CRM (SAP CRM, Salesforce or equivalent) through APIs, connectors and defined data schemas, within a client-controlled ICT environment	Degree or diploma in Information Systems, Computer Science, Information Technology, Digital Marketing or related field, and/or recognised CRM or marketing automation platform certification
Marketing Automation and Lead Operations Specialist	5+ years designing and operating lead capture, lead scoring, MQL and SQL qualification, routing and nurture journeys within a CRM or marketing automation platform, including reporting on conversion and pipeline contribution	Degree or diploma in Marketing, Digital Marketing, Information Systems or related field, and/or recognised marketing automation certification
Data Governance and Privacy Lead	5+ years in data governance, data quality and privacy compliance in a marketing or customer data environment, including POPIA or equivalent data protection regimes and consent management	Degree or diploma in Law, Information Management, Data Science, Information Systems or related field, and/or recognised data protection or privacy certification

26.1.2 **Second Stage – Functional criteria**

Bidders will be assessed on the functional criteria (Second Stage) as set out in this RFP. Only those Bidders which comply with the responsiveness criteria will proceed to the second Stage.

Stage gate 1: Functional and technical evaluation

A minimum score of 70% (49 points out of 70 points) is required to be considered for stage gate 2 presentations.

Stage gate 2: Presentation of the demo system

A maximum of 20 points is allocated for demo system presentations. A minimum score of 70% on the presentation is required (21 points out of 30 points).

A combined overall score of 70% (70 points out of 100 points) is required to progress to the Price and Preference evaluation stage.

Quality criteria	Sub criteria	Scoring	Maximum number of points
1. Company profile	A detailed overview of the organisation, including: • Legal entity name, registration details and ownership structure • Years of operation (a minimum seven (7) years in operation is required) • Organisational structure and leadership profile • Geographic footprint and areas operation (with specific referenc to experience in South Africa ar where applicable, broader Africa markets) • Confirmation that the bidder car operate within a client-controlled enterprise CRM and ICT governance environment	• Poor = 0 to 3 points • Average = 4 to 7 points • Good = 8 to 10 points	10
2. References	• Bidders are required to provide least five (5) contactable client references for work of a similar scope and complexity to that outlined in these Terms of Reference. The referenced work must have been completed with the past three (3) years and should demonstrate experience integrated digital marketing,	• 1 complete client referen provided = 1 point • 2 complete client references provided = 2 points • 3 complete client references provided = 3 points	**5**

Quality criteria	Sub criteria	Scoring	Maximum number of points
	campaign execution, multimedia production, digital media buying SEO, social media managemen and/or CRM-connected lead management, as applicable to t TOR. • Each reference must include the client name, project description, contract duration, value (where permissible), and full contact details (including name, designation, email address and telephone number) for verificatic purposes. • Where a bidder has previously provided services to the DBSA, such references must not be included as part of the five (5) required client references.	• 4 complete client references provided = 4 points • 5 complete client references provided = 5 points	
3. Understanding of scope and proposed approach	Provide a detailed overview of how you will support the DBSA and fulfil the services outlined in this TOR. Please include the following: **3.1 Digital strategy and lead generation** Explain how you will: • Develop an integrated, full-funn digital strategy aligned to priority sectors. • Execute quarterly Development Impact campaigns as lead-generating programmes. • Generate, segment and track MQLs and SQLs against the definitions in this TOR. • Integrate paid media, landing pages, gated content and direct marketing into a measurable conversion ecosystem.	**3.1 Digital strategy and lea generation: 6** • Poor (0 to 2): Generic strategy; no structured lead-generation framewo • Adequate (3 to 4): Clear strategy with basic MQL and SQL tracking • Excellent (5 to 6): Robus measurable full-funnel model with defined pipeli contribution **3.2 Conversion and nurtur architecture: 6** • Poor (0 to 2): Limited conversion focus • Adequate (3 to 4): Define conversion and segmentation model	**25**

Quality criteria	Sub criteria	Scoring	Maximum number of points
	3.2 Conversion and nurture architecture Detail your approach to: • Campaign landing pages and microsites optimised for conversion. • Targeted media buying and cos per-lead optimisation. • Lead capture, segmentation and nurture journeys (HTML mailers remarketing, long-cycle nurture) • Reporting on conversion rates a cost per qualified lead. **3.3 MarTech and CRM integration approach** Noting that DBSA's ICT function wil implement, configure and maintain t CRM and MarTech landscape and that the appointed service provider required to plug into it, explain how you will: • Connect campaigns, the DBSA website, Solution Finder, landing pages, microsites, forms, events and webinars to the CRM using ICT-issued integration specifications, endpoints and da schemas. • Define marketing data requirements, field mapping, validation rules, source and campaign identifiers and conser flags. • Specify lead scoring, qualificatio routing, notification and Frontlin handover requirements for ICT configuration.	• Excellent (5 to 6): Structured conversion architecture with cost optimisation and measurable funnel tracki **3.3 MarTech and CRM integration approach: 13** • Poor (0 to 4): No credible integration approach; assumes agency-owned CRM or parallel lead database; no reference t ICT specifications, POPI or data governance • Adequate (5 to 8): Integration described at a high level; some understanding of field mapping, tagging and consent, but limited testi governance or portability detail • Good (9 to 11): Clear plu in model aligned to ICT-issued specifications, wit defined data requirement taxonomy, scoring and qualification inputs, POP controls and a testing approach • Excellent (12 to 13): Comprehensive, evidenc based integration model covering field-level data requirements, attribution integrity, deduplication, consent, responsible AI governance, UAT participation,	

Quality criteria	Sub criteria	Scoring	Maximum number of points
	• Apply campaign taxonomy, UTM conventions, tag management, conversion tracking and deduplication to protect attributi integrity. • Ensure POPIA compliance, consent management, informati security and responsible AI governance, including full disclosure of third-party tools ar data processing. • Participate in solution design, us acceptance testing, defect resolution, cut-over and documentation alongside ICT. • Remain portable to any future CRM or lead management syste adopted by DBSA.	documentation, defect management and portability to a future CR	
4. Demonstrable experience	**Demonstration of relevant expertise and competencies** Bidders must submit three (3) real-l case studies and/or campaigns demonstrating proven capability in delivering structured, measurable digital marketing programmes. At least one (1) case study must evidence integration of marketing activity with a client-owned or client implemented CRM or marketing automation platform. The case studies must evidence expertise in: • Integrated digital marketing with measurable lead generation (MC and SQL): demonstrate how qualified leads were generated, defined, tracked and progressed through the funnel.	**Relevance and alignment:** • 1: Not aligned to scope; MQL, SQL, lead generation, CRM integration or AI-enabled optimisation evidence. • 2: Partial alignment; limited MQL, SQL, lead generation, CRM integration or AI-enabled optimisation. • 3-4: Strong alignment; measurable lead generation, MQL and SQ CRM integration and AI-enabled optimisation evident. • 5: Fully integrated digital programmes with clear MQL and SQL tracking, performance media	20

Quality criteria	Sub criteria	Scoring	Maximum number of points
	• Performance-led media buying and conversion optimisation: demonstrate paid media strateg targeting, optimisation approach and cost-efficiency improvemen (for example CPL, conversion ra uplift). • Full-funnel digital campaign execution: demonstrate end-to-end delivery including landing pages, gated content, CRM integration and direct marketing nurture journeys. • CRM and MarTech integration within a client-controlled environment: demonstrate how campaigns and platforms were connected to a client CRM, how data requirements and field mapping were defined, how tracking and attribution were maintained, how consent and privacy obligations were met, ar how the agency worked with the client's IT or ICT function throug testing and go-live. • AI content strategy and performance optimisation: demonstrate the application of A and data-driven tools to inform content strategy and audience insights, support AI-assisted content creation and optimisatio track and analyse content performance and user behaviou and enable continuous optimisation of messaging, targeting and SEO. Case studie should demonstrate measurable improvements in engagement,	delivery, full-funnel execution, CRM-connect lead management and A enabled optimisation. **Strategy and framework: 5** • 1: Tactical only; no structured funnel or lead qualification criteria. • 2: Basic targeting and optimisation approach. • 3-4: Clear funnel design and optimisation logic. • 5: Data-led methodology with defined MQL and SC criteria, funnel stages, da and field requirements, testing frameworks and continuous AI optimisatic **Execution, integration and governance: 5** • 1 : Limited execution det no governance, integratic or monitoring. • 2 : Execution described; basic reporting; integratic referenced but not evidenced. • 3-4: End-to-end rollout including landing pages, gated content, CRM and email integration and reporting. • 5 : Structured delivery model with documented integration to a client CR QA processes, UAT participation, dashboards reporting cadence, POPI and data governance	

Quality criteria	Sub criteria	Scoring	Maximum number of points
	reach, conversion rates or lead quality. **For each case study, provide:** • Client overview and objectives: client profile and sector, busines challenge, defined KPIs (for example lead targets, CPL, SQL conversion). • Strategy and approach: audienc segmentation and funnel design channel mix and media rationale MQL and SQL qualification criteria, optimisation methodolog • Execution, integration and governance: campaign rollout a integration (landing pages, gate content, CRM, email), integratio and testing approach with the client's technology function, reporting structure and performance monitoring, data governance and privacy control quality assurance and governan controls. • Measurable results: quantified outcomes (for example lead volumes, CPL, conversion rates SQL progression), evidence of optimisation and impact on pipeline or ROI.	controls and AI-supporte optimisation. **Results and impact: 5** • 1 : No quantified results. • 2 : Basic performance metrics provided. • 3-4: Clear CPL, conversi and lead metrics. • 5: Demonstrated CPL optimisation, MQL to SQ progression, pipeline impact, and evidence of enabled performance improvement.	
5. Personnel and experience	Please submit brief biographies of: • Management team • Key team members • Account management team In table format, please submit the following for relevant employees wh will be working on and supporting th DBSA account across all the servic required:	• Poor = 0 to 3 points • Average = 4 to 6 points • Good = 7 to 10 points	10

Quality criteria	Sub criteria	Scoring	Maximum number of points
	• Name • Position • Key responsibilities • Number of years working at you agency • Number of years total relevant experience • List of campaigns and clients th resource has worked on at your agency The proposed team must include th MarTech and CRM Integration Specialist, Marketing Automation ar Lead Operations Specialist and Dat Governance and Privacy Lead roles set out in the Eligibility Criteria. Whe an individual is proposed for more than one role, the bidder must state the roles, time allocation and how capacity, continuity and quality will b maintained.		
Total			**70**

2 Presentation

Bidders who meet the threshold will be shortlisted to give a presentation to the bid evaluation committee. The presentation will be held virtually.

The presentation must be submitted as part of the bidder's initial tender submission. Bidders must submit all required documentation, including the presentation, by the tender closing date and time. No additional or revised submission documents may be provided after the tender has closed, unless formally requested through the applicable procurement process.

Only bidders who meet the relevant stage-gate requirements and minimum thresholds will be invited to present. The presentation stage will be based on the information submitted in the bidder's tender response. Bidders may refine how they present their submitted content when invited to present, but they may not introduce new substantive information that was not included in their tender submission.

Criterion	Sub criteria	Scoring	Points
Presentation	• Company overview and profile • Experience and expertise in the relevant areas outlined in the Terms of Reference • Resources and account management approach • Evidence of understanding of the scope as stated in the Terms of Reference • At a high level, explain how you will suppor the DBSA in the development, planning an implementation of a digital and social medi strategy • At a high level, explain how you will plug in the DBSA CRM and MarTech landscape implemented by ICT, and how leads will be captured, qualified, nurtured, handed over and reported • Overview of two relevant case studies or campaigns	• Poor = 0 to 14 points • Average = 15 to 20 points • Good = 21 to 30 points	**30**

Third Stage – price

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

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

26.2 **NB: Bidders are required to submit, as Annexure J to their Bids, any documentation which supports the responses provided in respect of the Eligibility Criteria below.**

27. Risk Analysis and Objective Criteria

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

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

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

28. Due Diligence

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

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

b. Pending litigation/liquidation/business rescue (distinct from Working Capital)
DBSA may consider any pending litigation in a court of law or administrative tribunal as part of its risk assessment.

c. Performance

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

d. Reputational harm

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

e. Restricted/Blacklisted

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

f. **Vetting**

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

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

a. Financial stability of the bidder based on key ratio analysis ;
b. Efficiency ;
c. Profitability ;
d. Financial Risk;
e. Liquidity ;
f. Acid Test ;
g. Solvency; and
h. Commercial relationship with a politically exposed and brand risk

i. The DBSA reserves the right to award the scope in full or part thereof, subject to budget availability.

ii. The DBSA reserves the right to negotiate to ensure the value for money principle is not compromised.

29. Generally, suppliers have their own business standards and regulations. Although DBSA cannot control the actions of our suppliers, we will not tolerate any Illegal activities. These include, but are not limited to:

- Misrepresentation of any kind (e.g. origin of manufacture, specifications, intellectual property rights, etc.);
- Collusion;
- Failure to disclose accurate information required during the sourcing activity (ownership, financial situation, BBBEE status, etc.);
- Corrupt activities listed above; and
- Harassment, intimidation or other aggressive actions towards DBSA'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 RFP.

30.2 A Bid must not be conditional on:

30.2.1 the Board approval of the Bidder or any related governing body of the Bidder being obtained.

30.2.2 the Bidder conducting due diligence or any other form of enquiry or investigation.

30.2.3 the Bidder (or any other party) obtaining any regulatory approval or consent.

30.2.4 the Bidder obtaining the consent or approval of any third party; or

30.2.5 the Bidder stating that it wishes to discuss or negotiate any commercial terms of the contract.

30.3 The DBSA may, in its absolute discretion, disregard any Bid that is, or is stated to be, subject to any one or more of the conditions detailed above (or any other relevant conditions).

30.4 The DBSA reserves the right to accept a Bid in part or in whole or to negotiate with a Bidder in accordance with the provisions of this RFP and the applicable laws and regulations.

31. CLARIFICATION OF BIDS

31.1 The DBSA may seek clarification from and enter into discussions with any or all of the Bidders in relation to their Bid. The DBSA may use the information obtained when clarification is sought or discussions are held in interpreting the Bid and evaluating the cost and risk of accepting the Bid. Failure to supply clarification to the satisfaction of the DBSA may render the Bid liable to disqualification.

31.2 The DBSA is under no obligation to seek clarification of anything in a Bid and reserves the right to disregard any clarification that the DBSA considers to be unsolicited or otherwise impermissible or irrelevant in accordance with the rules set out in this RFP.

32. DISCUSSION WITH BIDDERS

32.1 The DBSA may elect to engage in detailed discussions with any one or more Bidder(s), with a view to maximising the benefits of this RFP as measured against the evaluation criteria and in fully understanding a Bidder's offer.

32.2 Where applicable, the DBSA will invite Bidders to give a presentation to the DBSA in relation to their submissions.

32.3 The DBSA is under no obligation to undertake discussions with, and Bidders.

32.4 In addition to presentations and discussions, the DBSA may request some or all Bidders to:

32.4.1 conduct a site visit, if applicable.

32.4.2 provide references or additional information; and/or

32.4.3 make themselves available for panel interviews.

33. SUCCESSFUL BIDS

33.1 Selection as a successful Bidder does not give rise to a contract (express or implied) between the successful Bidder and the DBSA for the supply of the Services. No legal relationship will exist between the DBSA and a successful Bidder for the supply of the Services until such time as a binding contract is executed by them.

33.2 The DBSA may, in its absolute discretion, decide not to enter into pre-contractual negotiations with a successful Bidder.

33.3 A Bidder is bound by its Bid and all other documents forming part of the Bidder's Response and, if selected as a successful Bidder, must enter into a contract on the basis of the Bid with or without further negotiation.

34. NO OBLIGATION TO ENTER INTO CONTRACT

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

34.2 The DBSA may conduct a debriefing session for all Bidders (successful and unsuccessful). Attendance at such debriefing session is optional.

35. BIDDER WARRANTIES

35.1 By submitting a Bid, a Bidder warrants that:

35.1.1 it did not rely on any express or implied statement, warranty or representation, whether oral, written, or otherwise made by or on behalf of the DBSA, its officers, employees, or advisers other than any statement, warranty or representation expressly contained in the RFP;

35.1.2 it did not use the improper assistance of DBSA'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 RFP; and

35.1.5 it will provide additional information in a timely manner as requested by the DBSA to clarify any matters contained in the Bid.

36. DBSA'S RIGHTS

36.1 Notwithstanding anything else in this RFP, and without limiting its rights at law or otherwise, the DBSA reserves the right, in its absolute discretion at any time, to:

36.1.1 cease to 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 RFP or the Tendering Process;

36.1.3 vary or extend any time or date specified in this RFP

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 RFP.

37. GOVERNING LAWS

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

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

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

Terms of Reference

Integrated Digital Marketing and Development Partner

Terms of reference

3 Introduction

These Terms of Reference (TOR) are issued by the Development Bank of Southern Africa (DBSA) for the provision of integrated digital marketing, multimedia production, digital amplification and structured project documentation services over a period of three (3) years.

Aligned to the Bank's Decadal Strategy and the revised Marketing and Communications (M&C) Strategy, DBSA requires a coordinated, performance-led and innovation-enabled digital ecosystem that strengthens institutional credibility, enhances stakeholder engagement and consistently communicates measurable development impact.

In an increasingly data-driven and algorithm-led digital environment, communication must move beyond transactional messaging toward sustained, evidence-based storytelling that positions DBSA as a catalytic infrastructure partner across South Africa and the continent. The appointed Professional Service Provider (PSP) will therefore be required to deliver integrated digital campaign execution, structured digital media amplification, advanced content development and high-quality project site documentation that captures and translates infrastructure delivery into compelling institutional narratives.

This TOR further requires the appointed PSP to operate within DBSA's Marketing Technology (MarTech) and Customer Relationship Management (CRM) landscape. DBSA's ICT function will implement, configure, host and maintain that landscape, including SAP CRM or another suitable CRM platform, supporting APIs, workflow automation, data controls and dashboard reporting, under the Bank's Marketing Enablement for Pipeline Contribution initiative. The appointed PSP will not build, procure or own the CRM. It will be required to plug into the environment provided by ICT so that digital campaigns, platforms and content activity generate structured, traceable lead data that can be captured, qualified, nurtured, handed over to Frontline teams and measured through to opportunity creation.

The purpose of this tender is to appoint a suitably qualified and experienced PSP to partner with DBSA in operationalising this integrated digital environment. Bidders are required to submit a comprehensive proposal detailing their proposed solution, implementation methodology, integration approach, governance framework, performance measurement approach and indicative timelines for delivery across the contract period.

Organisational overview

4 Background

The Development Bank of Southern Africa (DBSA) is a leading development finance institution mandated to drive inclusive economic growth, enable regional integration and support sustainable infrastructure development across Africa.

In line with its Decadal Strategy, the Bank is focused on:

1. Driving inclusive economic recovery and infrastructure-led growth in South Africa.
2. Enhancing DBSA's role and impact across the African continent.
3. Achieving operational excellence and financial sustainability.

To support these strategic priorities, DBSA must consistently demonstrate how its interventions translate into tangible development outcomes. This requires structured documentation of infrastructure delivery across the full value chain, from project preparation and financing through to implementation and impact realisation.

Accordingly, DBSA seeks to appoint a suitably qualified and experienced agency to provide integrated digital campaign services and structured project video documentation services. The appointment aims to strengthen the Bank's development impact communication by producing high-quality, evidence-based multimedia content that documents project execution and translates this into measurable digital engagement, stakeholder trust and institutional positioning.

Significant and mandatory components of this TOR include:

- Systematic, high-quality project site documentation across priority sectors, capturing infrastructure delivery from preparation through to implementation and impact. This includes multimedia content development, cinematography, stakeholder interviews, executive commentary and technical storytelling that translate complex infrastructure financing into compelling, measurable development narratives suitable for multi-platform deployment.
- The execution, amplification and optimisation of an always-on Development Impact Campaign, structured as a performance-led digital programme rather than a once-off awareness initiative. This must include:
    - Full-funnel digital campaign architecture (awareness, consideration, engagement and conversion)
    - Targeted media buying and optimisation across relevant digital ecosystems
    - Development of dedicated campaign landing pages, microsites and sector portals aligned to priority themes
    - Creation of gated content assets (reports, case studies, insights, toolkits) to support lead generation

- Direct marketing capability, including professionally designed HTML mailers integrated into segmented stakeholder journeys
- Structured nurture pathways for MQLs and SQLs aligned to pipeline and partnership objectives
- Continuous performance tracking, dashboard reporting and optimisation linked to measurable outcomes
- Integration of all lead-generating touchpoints into the DBSA CRM environment implemented by ICT, in line with the integration specifications, data standards and security controls issued by ICT.

The Development Impact Campaign must function as a strategic content engine, strengthening institutional credibility, enhancing investor confidence, and translating infrastructure delivery into sustained stakeholder engagement and capital mobilisation.

Marketing enablement for pipeline contribution

Marketing and Communications has advanced the Marketing Enablement for Pipeline Contribution initiative as a key digital enablement use case within the Bank's broader digital transformation journey. The initiative establishes an integrated MarTech capability that connects the DBSA website, Solution Finder, marketing campaigns, events, webinars and other digital engagement channels to SAP CRM or another suitable CRM platform, supported by APIs and workflow automation.

For the avoidance of doubt, the following division of responsibility applies for the duration of this contract:

Area	DBSA ICT (implements and owns)	Appointed service provider (plugs in)
CRM platform	Selection, licensing, implementation, configuration, hosting, maintenance and support of SAP CRM or another approved CRM.	Operates within the CRM provided. No procurement, no separate CRM, no parallel lead database.
Integration	Builds and maintains APIs, connectors, endpoints, authentication and integration architecture. Issues integration specifications.	Configures campaign, website, landing page, microsite, form, event and webinar touchpoints to submit data to ICT endpoints in the required format.
Workflow and automation	Configures lead routing, assignment, notifications, escalations and status workflows in the CRM.	Defines the marketing requirements, scoring logic, journey design, content and triggers that those workflows execute.
Data governance	Establishes data governance, privacy, retention, security and access controls.	Applies the campaign taxonomy, tagging, consent capture and data quality practices required to comply with those controls.

Area	DBSA ICT (implements and owns)	Appointed service provider (plugs in)
Dashboards	Develops and maintains operational, campaign and executive dashboards and analytics infrastructure.	Supplies the marketing data layer, attribution model, measurement definitions, insight and optimisation recommendations that populate them.
Support	Provides ongoing technical support, system maintenance and continuous improvement of the MarTech environment.	Provides marketing operations support, campaign configuration, testing participation, training and knowledge transfer.

Bidders must propose an approach that operates within DBSA's current CRM environment while remaining flexible enough to accommodate any future CRM or lead management system that DBSA may implement during the contract period. Bidders must not price for, propose or assume ownership of the CRM platform itself.

Marketing and communications unit (M&C)

The appointed service provider will work closely with DBSA's Marketing and Communications (M&C) Unit, situated within the Strategy, Economics and Sustainability Division, and will collaborate with ICT Business Solutions and Frontline teams on all lead and CRM-related activity.

M&C is the custodian of all corporate and sector-specific communications, including marketing, public relations, media engagement, events and Corporate Social Investment (CSI). The function is responsible for safeguarding brand integrity, aligning communication to institutional strategy and ensuring that messaging supports the Bank's mandate and performance objectives.

The unit operates with a lean team of diverse skills and experience. As such, the appointed service provider will be required to function as a strategic execution partner, augmenting internal capability while ensuring alignment to governance, brand standards and institutional priorities.

In addition, the service provider must develop and implement a structured skills transfer programme to support capability uplift within the M&C unit. This programme should facilitate knowledge sharing, process documentation and the transfer of technical skills related to digital amplification, multimedia production, analytics, performance optimisation, marketing automation and CRM-enabled lead management.

Brand positioning and strategic alignment

The DBSA's overarching purpose is articulated as: “Building Africa's Prosperity.”

The Bank's Development Position defines its ethos and guides how it delivers on its mandate, driving inclusive growth, mobilising private capital, enabling sustainable infrastructure and advancing socioeconomic transformation across Africa.

The Marketing and Communications Strategy is anchored in the Decadal Strategy and positions communication as a strategic enabler of institutional performance. The M&C function is tasked with:

- Increasing awareness and understanding of DBSA's role and value across the infrastructure value chain.
- Building and protecting institutional trust and credibility.
- Supporting pipeline development through structured engagement, visibility and measurable lead contribution.
- Positioning DBSA as a thought leader in infrastructure finance, climate finance, transmission expansion and IPP acceleration.

Communication must therefore move beyond announcement-based messaging toward development-in-action storytelling, showcasing measurable outcomes, catalytic financing mechanisms and real infrastructure delivery.

Communications approach

The unit positions the Bank through evidence-based storytelling that demonstrates infrastructure delivery across the full value chain, from project preparation and financing to implementation and long-term sustainability. This includes showcasing real project outcomes, catalytic financial and non-financial interventions, innovative financing structures, strategic partnerships and measurable development milestones.

The appointed PSP will be expected to translate and operationalise this strategic positioning through an integrated, performance-led digital framework that includes:

- Structured and cinematic project documentation that captures infrastructure impact in a credible, technically sound and visually compelling manner.
- Always-on development impact storytelling, ensuring sustained visibility of priority sectors, transactions and implementation progress.
- Integrated digital campaign execution, aligned to quarterly strategic themes and institutional priorities.
- Performance-led media buying and digital amplification, optimised across relevant digital ecosystems to strengthen reach, influence and stakeholder engagement.
- Full-funnel digital enablement, including campaign landing pages, microsites, gated content assets and direct marketing (HTML mailers) to support lead generation and nurture journeys.
- CRM-connected lead capture, qualification, nurturing and handover, executed within the MarTech landscape implemented by ICT.
- Robust analytics, attribution and performance reporting, linking digital activity to awareness, engagement, investor confidence, lead quality and pipeline relevance.

All execution must adhere to DBSA's governance standards, brand guidelines, information security policies and ICT compliance requirements, while demonstrating agility, innovation, scalability and measurable contribution to the Bank's strategic objectives over the contract period.

Target audience

DBSA's communications and digital engagement efforts are directed at a diverse and strategically important stakeholder ecosystem, aligned to the Bank's mandate and Decadal Strategy priorities.

These audiences include:

- The Shareholder and policymakers
- Institutional investors, multilateral development banks, development finance institutions and asset managers
- Clients, including municipalities, state-owned entities, public sector institutions and project sponsors
- Private sector partners, businesses and infrastructure developers
- National Treasury and other government stakeholders
- Media and thought leadership platforms
- Civil society and community stakeholders
- Corporate Social Investment (CSI) beneficiaries
- Youth (18 to 35), particularly those interested in infrastructure, sustainability and development careers
- Job seekers, current and prospective employees
- Suppliers
- Regional partners across the Rest of Africa
- Internal stakeholders and the broader public

Each stakeholder group engages with DBSA from a different vantage point, whether as funder, implementation partner, beneficiary, regulator or observer, and therefore requires differentiated, platform-appropriate communication that reinforces trust, transparency and institutional credibility.

The challenge is not limited to one audience segment. DBSA requires a partner that can ensure the right message reaches the right audience through the right channel, in a manner that is relevant, accessible and measurable. Bidders must demonstrate their ability to work across diverse stakeholder groups with different content needs, levels of technical understanding, decision-making roles and engagement requirements, including audiences that are traditionally difficult to reach.

The digital ecosystem must support targeted engagement, structured storytelling and measurable interaction across these segments, ensuring that communication is not only visible but meaningful and impact-driven.

Communications narrative

DBSA's communications narrative articulates what stakeholders must know, understand and believe about the institution. It underpins the Bank's brand promise of “Building Africa's Prosperity” and positions DBSA as a catalytic infrastructure partner across the continent.

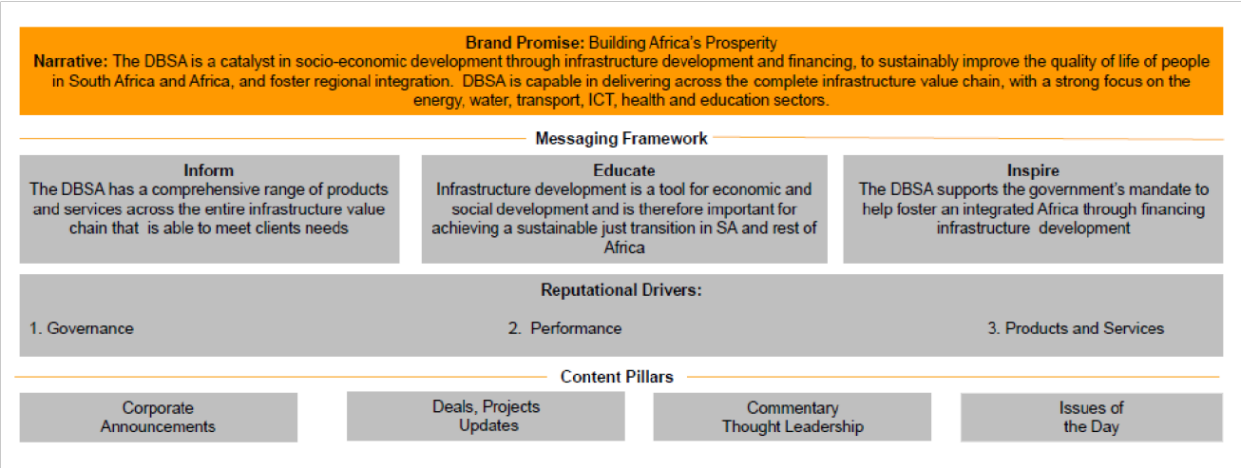
At its core, the narrative reflects that DBSA is a catalyst for inclusive socio-economic development through infrastructure financing, preparation and implementation support. The Bank mobilises capital, de-risks projects and partners across sectors to sustainably improve quality of life, enable regional integration and drive economic resilience across South Africa and the African continent.

DBSA operates across the full infrastructure investment value chain, from project preparation and structuring, through blended finance and capital mobilisation, to implementation oversight and long-term sustainability. The Bank maintains a strong focus on priority sectors including energy (with emphasis on transmission expansion and IPP acceleration), water and sanitation, transport and logistics, ICT, health and education.

The communications approach must therefore consistently demonstrate development in action, translating complex financial instruments, catalytic capital deployment and project execution into accessible, evidence-based narratives that highlight measurable outcomes and institutional impact.

The narrative must reinforce DBSA's role as a trusted, credible and execution-focused development finance institution capable of mobilising private capital at scale, strengthening infrastructure ecosystems and advancing sustainable growth across Africa.

Messaging framework



Overview of key requirements

5 Objectives

DBSA seeks to appoint a suitably qualified and experienced service provider to act as a strategic digital execution and performance partner to the Marketing and Communications (M&C) Unit. The appointed agency will support the Bank with a diverse portfolio of development impact campaigns, institutional positioning initiatives and stakeholder engagement programmes aligned to the Decadal Strategy and the revised Marketing and Communications strategy.

The service provider will be required to operate as a trusted extension of the M&C function, delivering integrated digital marketing execution, structured digital media buying and placement, advanced multimedia production, AI-optimised performance enhancement and CRM-connected lead management within the MarTech landscape implemented by ICT. The role encompasses a coordinated, measurable and innovation-enabled digital ecosystem.

The appointed agency must demonstrate strong capability across:

- Integrated digital campaign execution and optimisation
- Digital media buying and structured paid amplification (including SEM and programmatic)
- AI-enabled targeting, testing and performance refinement
- Advanced search engine optimisation (SEO) and search visibility
- AI search optimisation and discoverability across AI-enabled discovery environments
- Always-on Development Impact storytelling
- Structured project site documentation and cinematic multimedia production
- Social media management and community engagement
- MarTech and CRM integration within a client-implemented enterprise landscape
- End-to-end lead management, including capture, validation, scoring, qualification, nurturing, routing, Frontline handover and feedback loops
- Automated customer journeys, including notifications, follow-ups, escalations and re-engagement campaigns
- Data governance and standardisation, including campaign tagging, lead deduplication, source attribution and data-quality management
- POPIA compliance and data management, including consent management, data security and record-retention controls
- Analytics, attribution, reporting and performance governance, including MQL, SQL, conversion rate, ROMI, ROAS and pipeline contribution reporting
- Creative design systems and scalable digital asset production

- Technical documentation, user testing, training and continuous optimisation in collaboration with M&C and ICT

The agency must be capable of delivering high-quality content across formats, including infographics, executive video interviews, documentary-style project storytelling, animation, motion graphics, email marketing assets and digital-first campaign creative. Multimedia content development and structured project documentation will form a mandatory component of the scope, as set out in section 4.2.

Bidders must demonstrate experience operating within South Africa and, ideally, across the SADC region and broader African markets, with an understanding of development finance, infrastructure ecosystems and multi-stakeholder environments.

The appointed service provider will be expected to deliver measurable digital engagement, strengthen DBSA's institutional credibility, evidence Marketing's contribution to the opportunity pipeline, and ensure that development impact is consistently translated into compelling, evidence-based and performance-led digital narratives.

The performance of the appointed service provider will be assessed annually against agreed Key Performance Indicators aligned to the DBSA Decadal Strategy and the Marketing and Communications (M&C) Strategy.

KPIs will be structured across five performance pillars:

a) Development impact visibility and institutional positioning

Measurable uplift in development impact storytelling, executive visibility, thought leadership positioning and stakeholder engagement across priority sectors (including infrastructure, transmission and IPP acceleration).

b) Digital performance and media efficiency

Measurable improvements in reach, engagement, conversion, cost-efficiency of digital media spend, search visibility (SEO), SEM performance and AI-driven optimisation outcomes.

c) Campaign execution and delivery excellence

Timely delivery of integrated campaigns, always-on activities, structured project documentation and multimedia production aligned to quality and governance standards.

d) Pipeline enablement and MarTech performance

Volume and quality of leads captured into the DBSA CRM, MQL and SQL conversion rates, cost per qualified lead, nurture progression, handover turnaround, data quality and accuracy of source attribution, together with demonstrable ROMI, ROAS and pipeline contribution reporting.

e) Governance, collaboration and capability uplift

Effective account management, budget adherence, reporting discipline, crisis responsiveness, POPIA and information security compliance, collaboration with ICT and Frontline teams, and structured skills transfer to the M&C Unit.

Lead definitions and pipeline enablement

DBSA's lead generation ambition is to move beyond awareness and engagement metrics towards a measurable lead generation and pipeline enablement capability. For the purposes of this tender and the resulting contract:

- A lead refers to a stakeholder, potential client, partner or prospect generated through a DBSA digital, campaign, content or marketing touchpoint.
- A Marketing Qualified Lead (MQL) is a lead that has been sufficiently assessed, enriched or nurtured by Marketing and Communications and confirmed as aligned to DBSA's mandate, sectors, funding focus, project scale, stakeholder relevance and business requirements.
- A Sales Qualified Lead (SQL) is a lead that has been handed over to the relevant Frontline or business unit for further engagement, assessment and potential progression into the business development or transaction pipeline.

Bidders must propose a practical measurement, qualification and reporting framework that enables DBSA to track leads from acquisition through nurturing, qualification and handover, and that operates within the CRM environment implemented by ICT.

Bidders should note that infrastructure finance transactions often have long lead times and may not convert within short campaign cycles. The measurement framework must therefore account for both immediate digital performance and longer-term pipeline enablement.

Scope of work

4.1 Digital marketing and media buying execution

The appointed service provider will deliver a fully integrated digital ecosystem that supports always-on Development Impact communication and structured campaign amplification.

The agency will implement advanced SEO practices to strengthen DBSA's search visibility across priority infrastructure and climate finance themes. This includes technical optimisation, keyword strategy, structured metadata implementation and ongoing search performance monitoring.

Structured digital media buying and placement must form a core component of execution. The service provider will manage paid social campaigns, SEM, programmatic placements, display advertising and Google Display Network (GDN) activations. AI-assisted bid optimisation, audience segmentation and

retargeting must be embedded within media management practices to ensure cost efficiency and measurable performance.

Email marketing support, including event invitations, awareness campaigns and stakeholder updates, must integrate with campaign environments, CRM records and performance tracking mechanisms.

Digital presence at DBSA events across South Africa and the Rest of Africa must include live coverage, content capture and real-time amplification across platforms.

Research, sector insights and competitor analysis must be conducted regularly to inform content direction, media allocation and positioning.

Campaign management must be fully integrated, covering all relevant digital touchpoints and ensuring a seamless user journey across owned, earned and paid channels. All lead-generating touchpoints must be tagged, tracked and connected to DBSA CRM in accordance with section 4.7. Continuous collaboration with other agencies and vendors will be required to ensure message consistency and platform coherence.

4.2 Multimedia content development and structured project documentation

Multimedia content development and structured project documentation is a mandatory component of this TOR.

The service provider must develop and deliver four (4) multimedia content productions per quarter, which equates to sixteen (16) per annum and forty-eight (48) over the contract period. Each quarter must include:

- Two (2) short-form productions of under one (1) minute in duration, designed for social-first distribution and paid amplification; and
- Two (2) productions of under four (4) minutes in duration, suited to documentary-style project storytelling, stakeholder interviews, executive commentary and thought leadership.

Each production must include, as required: creative concept, treatment and script; pre-production and shoot planning; filming, including project site footage and interviews; editing and post-production; motion graphics, animation and supers; subtitles and accessibility captions; and versions adapted to the specifications of each relevant digital platform.

Quarterly productions must be planned in line with the quarterly Development Impact campaigns and the always-on content calendar, and the topics, formats and delivery dates must be agreed with DBSA at the start of each quarter.

The service provider will be responsible for sourcing, appointing and managing any sub-contractors required. All associated production costs, including conceptualisation, scripting, crew, pre-production, post-production, editing, animation and licensing, must be priced as set out in the Pricing Schedule. The service

provider must also manage licensing and intellectual property compliance, and provide access to relevant stock imagery and footage where required.

4.3 Reporting and performance governance

The service provider must deliver structured, insight-led reporting on a monthly basis. Reporting must go beyond descriptive metrics and provide strategic insight that informs optimisation and decision-making.

Monthly KPI reports must cover:

- Always-on performance
- Campaign-specific performance
- Social media analytics
- SEO and SEM outcomes
- Media spend efficiency
- Engagement and audience growth
- Sentiment analysis
- Lead volumes, lead sources and lead quality
- MQL and SQL progression, conversion rates and cost per qualified lead
- ROMI, ROAS and marketing contribution to the opportunity pipeline

These reports will inform ongoing optimisation and budget allocation decisions. Quarterly strategic performance reviews will be expected to assess progress against annual targets.

4.4 Account management

The service provider will assume day-to-day management of the DBSA account and participate in weekly status meetings, as well as ad hoc sessions initiated by DBSA.

The agency must provide structured status updates, manage projects from initiation to reporting, and present proactive recommendations informed by performance data and innovation trends.

The service provider must demonstrate agility, responsiveness and flexibility in adapting creative outputs where required, particularly in time-sensitive or reactive campaign environments.

The service provider must also participate in the joint governance forum between Marketing and Communications, ICT Business Solutions and Frontline teams established for the Marketing Enablement for Pipeline Contribution initiative.

4.5 Budget management

The service provider will be responsible for prudent and transparent budget management.

This includes preparation of reports detailing total spend to date, monthly review of expenditure against allocated budgets and proactive identification of deviations or cost risks.

All responses to briefs must align with approved budgets and demonstrate cost-efficiency across media buying, production and campaign execution.

4.6 Quality assurance

Quality assurance is the responsibility of the service provider.

All deliverables must undergo internal quality testing and approval prior to submission to DBSA. QA processes and review checklists must be regularly updated to maintain high standards.

The service provider must allocate suitably qualified personnel to ensure delivery against agreed KPIs and institutional quality expectations.

4.7 MarTech and CRM integration enablement

DBSA's ICT function will implement, configure, host and maintain the CRM and MarTech landscape, including SAP CRM or another suitable CRM platform, supporting APIs, workflow automation, data controls and dashboard infrastructure. The appointed service provider will be required to plug into this landscape. It will not build, procure, host or own the CRM, and it may not operate a parallel lead database outside the DBSA environment.

Within that landscape, the service provider will be responsible for:

- Connecting the DBSA website, Solution Finder, campaign landing pages, microsites, gated content, forms, events, webinars, HTML mailers and paid media lead forms to the CRM through the integration specifications, endpoints and data schemas issued by ICT.
- Defining and documenting the marketing data requirements for each touchpoint, including required and optional fields, validation rules, source and campaign identifiers, consent flags and error handling.
- Configuring tag management, conversion tracking, event tracking and analytics on all DBSA-owned properties to support accurate lead attribution.
- Testing all integration points before go-live and after any change, and logging, triaging and resolving marketing-side defects.
- Maintaining a change log of all tracking, form and integration changes, and submitting all proposed changes to ICT for approval before deployment.

- Ensuring that all integrations remain compatible with any future CRM or lead management system that DBSA may implement during the contract period, and supporting migration at no additional licensing cost to DBSA.

DBSA owns and will continue to own its social media accounts, business manager accounts, ad accounts, tag management containers, analytics assets, domains and related digital properties. The appointed service provider will be granted the necessary access rights, subject to DBSA governance, cybersecurity and approval processes, to execute the agreed scope of work. DBSA does not intend for the appointed service provider to create or own new accounts where DBSA-owned accounts already exist. All accounts, data, tracking configurations and campaign assets remain the property of DBSA and must be handed over intact at the end of the contract.

4.8 End-to-end lead management, qualification and nurture

The service provider will design and execute the marketing side of the lead lifecycle within the CRM environment provided by ICT. System configuration, routing rules and workflow automation will be built by ICT based on requirements specified by Marketing and Communications and the service provider.

The service provider will be responsible for:

- Lead capture design across all campaign and platform touchpoints, including form design, progressive profiling, gated content mechanics and consent capture.
- Lead validation and enrichment inputs, including source tagging, campaign identifiers, deduplication rules and data-quality checks at the point of capture.
- Lead scoring models and MQL and SQL qualification criteria aligned to DBSA's mandate, priority sectors, funding focus, project scale and stakeholder relevance.
- Nurture journey design and content, including segmented HTML mailer sequences, remarketing, re-engagement and long-cycle nurture tracks appropriate to infrastructure finance lead times.
- Handover triggers, notification content and service level expectations for routing qualified leads to Frontline and business unit owners.
- Feedback loops that return Frontline disposition data into campaign optimisation, targeting and content decisions.
- Continuous optimisation of the funnel based on conversion, cost per qualified lead and lead quality data.

4.9 Customer journeys and audience mapping

DBSA has multiple stakeholder journeys across its mandate. These may include, but are not limited to, municipalities, public sector entities, investors, partners, clients, communities, job seekers, suppliers, policymakers, development stakeholders and internal stakeholders.

Where existing customer or stakeholder journeys are available and relevant, these may be shared with the appointed service provider during onboarding. For the purposes of the bid response, bidders are expected to propose an approach to mapping, validating and optimising priority stakeholder journeys, including how messaging, content, digital channels, lead capture, nurturing and reporting would be tailored to different audience groups.

Approved journeys must be reflected in the CRM configuration requirements submitted to ICT so that each journey stage is measurable.

4.10 Data governance, campaign taxonomy, POPIA and responsible AI

The service provider must comply with POPIA and all applicable DBSA information governance, cybersecurity, data protection and procurement requirements.

The service provider will be responsible for:

- Implementing and maintaining a standardised campaign naming and tagging taxonomy, including UTM conventions, campaign identifiers and channel codes, applied consistently across all paid, owned and earned activity.
- Applying deduplication, data-quality and consent-capture practices at every lead entry point, in line with the controls established by ICT.
- Maintaining source attribution integrity so that every lead in the CRM can be traced to a campaign, channel, asset and touchpoint.
- Supporting record retention, data subject request and consent withdrawal processes as directed by DBSA.

Where the service provider proposes the use of third-party AI tools, generative AI platforms, automation tools, data processing tools or cloud-based systems, it must clearly disclose:

- The tool or platform proposed;
- The purpose for which it will be used;
- The type of DBSA, stakeholder or campaign data that may be processed;
- Where the data will be hosted, stored or processed;
- Whether any data will be used to train third-party models;
- The privacy, security and data retention measures applicable;

- How POPIA compliance will be ensured;
- How confidential or sensitive DBSA information will be protected.

No DBSA confidential information, personal information, stakeholder information or unpublished campaign material may be uploaded to, processed by or stored in third-party AI tools unless expressly approved by DBSA in writing and subject to the relevant governance requirements. Bidders must propose a responsible AI governance approach as part of their methodology.

4.11 Measurement, attribution and pipeline reporting

DBSA requires a digital marketing partner that can move beyond vanity metrics such as impressions, reach, likes and engagement alone. Success must be linked to DBSA's strategic, reputational, developmental and business objectives.

Bidders must propose a measurement framework that includes, where relevant:

- Lead generation
- Lead quality
- Marketing Qualified Leads
- Sales Qualified Leads
- Pipeline enablement and marketing contribution to opportunity creation
- Return on marketing investment (ROMI) and return on advertising spend (ROAS)
- Cost per lead and cost per qualified lead
- Audience segmentation and targeting effectiveness
- Stakeholder journey progression
- Content relevance and message resonance
- Development impact storytelling effectiveness
- Improved discoverability across search and AI-enabled discovery environments
- Campaign conversion and optimisation performance
- Improved understanding of DBSA's mandate and offering
- Reputation, trust and stakeholder confidence
- Evidence-based reporting that supports decision-making

Operational, campaign and executive dashboards will be developed, hosted and maintained by ICT. The service provider is responsible for defining the marketing measurement model, supplying and validating the marketing data layer, ensuring attribution accuracy, and providing written insight, commentary and optimisation recommendations against dashboards.

Bidders must clearly demonstrate how they will define, measure, report and optimise performance against these outcomes.

4.12 Digital audit, tools and platform access

Relevant tool, platform and access information may be shared with the appointed service provider during onboarding, subject to DBSA's internal governance, cybersecurity and access protocols.

For bid response purposes, bidders should make reasonable assumptions based on standard enterprise digital marketing environments and must clearly state any proposed tools, integrations, dependencies or access requirements in their submission.

Bidders must indicate how they would conduct an initial digital audit within the first 30 days of appointment to confirm DBSA's current digital ecosystem, tools, platforms, access levels, reporting setup, tracking environment, data quality baseline, CRM readiness and optimisation opportunities. The audit output must include a prioritised remediation plan and a set of baseline metrics against which contract performance will be measured.

4.13 Integration testing, documentation, training and knowledge transfer

The service provider will participate in solution design workshops, requirements definition, user acceptance testing, defect resolution and cut-over activities alongside ICT and Marketing and Communications, at no additional cost to DBSA.

The service provider must produce and maintain technical and process documentation for all marketing-owned components, including tracking specifications, taxonomy standards, form and field definitions, journey maps, scoring logic and reporting definitions.

Bidders must propose a knowledge transfer and capacity-building approach that can accommodate a multidisciplinary Marketing and Communications team with varying levels of digital, content, analytics, media, campaign and platform experience. The proposed approach must include:

- Knowledge transfer methodology;
- Training or enablement format;
- Frequency of sessions;
- Skills areas to be covered, including campaign, lead and CRM-related processes;
- Practical handover or capability-building outputs;
- How learnings will be embedded into day-to-day ways of work.

Eligibility criteria

Bidders must demonstrate that they have access to suitably qualified and experienced personnel capable of delivering the services outlined in this TOR. The proposed team must possess the relevant skills, experience and qualifications aligned to the roles specified below.

The bidding entity must have a minimum of seven (7) years' operational experience. DBSA requires an established service provider with demonstrated organisational stability, operational maturity and the ability to support a multi-year contract of this nature. The experience of individual team members will be assessed separately under the relevant resource and technical evaluation criteria and does not replace the requirement for the bidding entity to meet the minimum operational period.

Reference letters and case studies must relate to work performed within the last three (3) years. This does not contradict the seven-year operational requirement. The seven-year requirement speaks to the maturity and stability of the bidding entity, while the three-year requirement ensures that submitted references and case studies are recent, relevant and reflective of current digital marketing, performance marketing, content, media, AI and technology practices.

To be considered responsive and eligible to proceed to the next stage of the evaluation process, bidders must submit the following documentation for each proposed resource:

- A detailed curriculum vitae (CV) clearly outlining the individual's qualifications, relevant professional experience and role on similar projects or campaigns; and
- Certified copies of academic qualifications and/or relevant professional certifications, as specified for the respective role.

The CVs submitted must clearly demonstrate that the proposed personnel meet or exceed the minimum experience requirements outlined in the table below. The information provided should indicate the individual's role, responsibilities and duration of involvement in relevant projects, particularly those related to digital marketing strategy, campaign execution, media optimisation, lead generation, CRM and marketing automation integration and the application of AI-enabled marketing tools where applicable.

DBSA acknowledges that, in some agencies, one individual may be capable of performing more than one role, such as Creative Director and Content Writer. This is not automatically disallowed. However, where one person is proposed for multiple roles, the bidder must clearly indicate the roles the individual will perform, the individual's relevant qualifications and experience for each role, the time allocation for each role, how workload conflicts will be managed, how continuity and quality will be maintained, and how the bidder will ensure that the DBSA account receives the required level of dedicated support. DBSA will assess whether the proposed arrangement is practical and whether it provides sufficient capacity to deliver the required scope.

Bidders must ensure that the proposed personnel are available and committed to the project should the bidder be appointed. DBSA reserves the right to request clarification, additional documentation or verification of qualifications and experience during the evaluation process.

Failure to submit the required documentation for any of the proposed personnel may result in the bid being deemed non-responsive and excluded from further evaluation.

All proposed resources must meet or exceed the minimum experience and qualification requirements set out in the table below.

Role	Minimum experience	Minimum qualification
Account Director / Strategic Lead	10+ years in integrated marketing within public sector, financial services or regulated environments	Bachelor's degree in Marketing, Communications, Business or related field
Digital Strategy Lead	6+ years in digital strategy and integrated campaign planning	Bachelor's degree in Marketing, Digital Marketing or related field
Media Buying & Performance Specialist	8+ years managing paid digital campaigns	Relevant degree or recognised digital marketing certification (e.g. Google Ads, Meta, programmatic platforms)
Creative Director	8+ years in creative direction within agency or institutional environments	Degree or diploma in Creative Design, Visual Communication or related field
Content Lead / Senior Copywriter	5+ years in content development, preferably within development, financial or corporate sectors	Degree in Communications, Journalism, Marketing or related field
AI Marketing Strategist	5+ years applying AI and data-driven technologies in marketing strategy, including campaign optimisation, automation and analytics	Bachelor's degree in Marketing, Data Science, Artificial Intelligence, Digital Marketing, Computer Science or related field
AI Marketing Specialist	2+ years supporting AI-powered marketing tools, including generative AI, automation platforms and analytics tools	Relevant degree, diploma or recognised certification in Digital Marketing, Artificial Intelligence, Data Analytics, Computer Science or related field
Multimedia Graphic & Digital Designer	8+ years in digital and campaign design	Degree or diploma in Graphic Design, Visual Communication or related field
Web Developer / UX Specialist	8+ years in web development and UX design	Degree or diploma in Web Development, Computer Science or related field

Role	Minimum experience	Minimum qualification
Analytics & Reporting Specialist	8+ years in digital analytics and reporting	Degree in Data Analytics, Marketing Analytics, Statistics or related field
MarTech and CRM Integration Specialist	5+ years integrating digital marketing platforms, websites and campaign environments with an enterprise CRM (SAP CRM, Salesforce or equivalent) through APIs, connectors and defined data schemas, within a client-controlled ICT environment	Degree or diploma in Information Systems, Computer Science, Information Technology, Digital Marketing or related field, and/or recognised CRM or marketing automation platform certification
Marketing Automation and Lead Operations Specialist	5+ years designing and operating lead capture, lead scoring, MQL and SQL qualification, routing and nurture journeys within a CRM or marketing automation platform, including reporting on conversion and pipeline contribution	Degree or diploma in Marketing, Digital Marketing, Information Systems or related field, and/or recognised marketing automation certification
Data Governance and Privacy Lead	5+ years in data governance, data quality and privacy compliance in a marketing or customer data environment, including POPIA or equivalent data protection regimes and consent management	Degree or diploma in Law, Information Management, Data Science, Information Systems or related field, and/or recognised data protection or privacy certification

TENDER EVALUATION & ADJUDICATION CRITERIA

Quality criteria	Sub criteria	Scoring	Maximum number of points
1. Company profile	A detailed overview of the organisation, including: • Legal entity name, registration details and ownership structure • Years of operation (a minimum of seven (7) years in operation is required) • Organisational structure and leadership profile • Geographic footprint and areas of operation (with specific reference to experience in South Africa and, where applicable, broader African markets) • Confirmation that the bidder can operate within a client-controlled enterprise CRM and ICT governance environment	• Poor = 0 to 3 points • Average = 4 to 7 points • Good = 8 to 10 points	10
2. References	• Bidders are required to provide at least five (5) contactable client references for work of a similar scope and complexity to that outlined in these Terms of Reference. The referenced work must have been completed within the past three (3) years and should demonstrate experience in integrated digital marketing, campaign execution, multimedia production, digital media buying, SEO, social media management and/or CRM-connected lead management, as applicable to this TOR. • Each reference must include the client name, project description, contract duration, value (where permissible), and full contact details (including name, designation, email address and telephone number) for verification purposes.	• 1 complete client reference provided = 1 point • 2 complete client references provided = 2 points • 3 complete client references provided = 3 points • 4 complete client references provided = 4 points • 5 complete client references provided = 5 points	**5**

Quality criteria	Sub criteria	Scoring	Maximum number of points
	• Where a bidder has previously provided services to the DBSA, such references must not be included as part of the five (5) required client references.		
3. Understanding of scope and proposed approach	Provide a detailed overview of how you will support the DBSA and fulfil the services outlined in this TOR. Please include the following: **3.1 Digital strategy and lead generation** Explain how you will: • Develop an integrated, full-funnel digital strategy aligned to priority sectors. • Execute quarterly Development Impact campaigns as lead-generating programmes. • Generate, segment and track MQLs and SQLs against the definitions in this TOR. • Integrate paid media, landing pages, gated content and direct marketing into a measurable conversion ecosystem. **3.2 Conversion and nurture architecture** Detail your approach to: • Campaign landing pages and microsites optimised for conversion. • Targeted media buying and cost-per-lead optimisation. • Lead capture, segmentation and nurture journeys (HTML mailers, remarketing, long-cycle nurture). • Reporting on conversion rates and cost per qualified lead. **3.3 MarTech and CRM integration approach**	**3.1 Digital strategy and lead generation: 6** • Poor (0 to 2): Generic strategy; no structured lead-generation framework • Adequate (3 to 4): Clear strategy with basic MQL and SQL tracking • Excellent (5 to 6): Robust, measurable full-funnel model with defined pipeline contribution **3.2 Conversion and nurture architecture: 6** • Poor (0 to 2): Limited conversion focus • Adequate (3 to 4): Defined conversion and segmentation model • Excellent (5 to 6): Structured conversion architecture with cost optimisation and measurable funnel tracking	**25**

Quality criteria	Sub criteria	Scoring	Maximum number of points
	Noting that DBSA's ICT function will implement, configure and maintain the CRM and MarTech landscape and that the appointed service provider is required to plug into it, explain how you will: • Connect campaigns, the DBSA website, Solution Finder, landing pages, microsites, forms, events and webinars to the CRM using ICT-issued integration specifications, endpoints and data schemas. • Define marketing data requirements, field mapping, validation rules, source and campaign identifiers and consent flags. • Specify lead scoring, qualification, routing, notification and Frontline handover requirements for ICT configuration. • Apply campaign taxonomy, UTM conventions, tag management, conversion tracking and deduplication to protect attribution integrity. • Ensure POPIA compliance, consent management, information security and responsible AI governance, including full disclosure of third-party tools and data processing. • Participate in solution design, user acceptance testing, defect resolution, cut-over and documentation alongside ICT. • Remain portable to any future CRM or lead management system adopted by DBSA.	**3.3 MarTech and CRM integration approach: 13** • Poor (0 to 4): No credible integration approach; assumes agency-owned CRM or parallel lead database; no reference to ICT specifications, POPIA or data governance • Adequate (5 to 8): Integration described at a high level; some understanding of field mapping, tagging and consent, but limited testing, governance or portability detail • Good (9 to 11): Clear plug-in model aligned to ICT-issued specifications, with defined data requirements, taxonomy, scoring and qualification inputs, POPIA controls and a testing approach • Excellent (12 to 13): Comprehensive, evidence-based integration model covering field-level data requirements, attribution integrity, deduplication, consent, responsible AI governance, UAT participation, documentation, defect management and portability to a future CRM	
4. Demonstrable experience	**Demonstration of relevant expertise and competencies** Bidders must submit three (3) real-life case studies and/or campaigns demonstrating	**Relevance and alignment: 5** • 1: Not aligned to scope; no MQL, SQL, lead generation,	20

Quality criteria	Sub criteria	Scoring	Maximum number of points
	proven capability in delivering structured, measurable digital marketing programmes. At least one (1) case study must evidence integration of marketing activity with a client-owned or client-implemented CRM or marketing automation platform. The case studies must evidence expertise in: • Integrated digital marketing with measurable lead generation (MQL and SQL): demonstrate how qualified leads were generated, defined, tracked and progressed through the funnel. • Performance-led media buying and conversion optimisation: demonstrate paid media strategy, targeting, optimisation approach and cost-efficiency improvements (for example CPL, conversion rate uplift). • Full-funnel digital campaign execution: demonstrate end-to-end delivery including landing pages, gated content, CRM integration and direct marketing or nurture journeys. • CRM and MarTech integration within a client-controlled environment: demonstrate how campaigns and platforms were connected to a client CRM, how data requirements and field mapping were defined, how tracking and attribution were maintained, how consent and privacy obligations were met, and how the agency worked with the client's IT or ICT function through testing and go-live. • AI content strategy and performance optimisation: demonstrate the application of AI and data-driven tools to inform content strategy and audience insights,	CRM integration or AI-enabled optimisation evidence. • 2: Partial alignment; limited MQL, SQL, lead generation, CRM integration or AI-enabled optimisation. • 3-4: Strong alignment; measurable lead generation, MQL and SQL, CRM integration and AI-enabled optimisation evident. • 5: Fully integrated digital programmes with clear MQL and SQL tracking, performance media delivery, full-funnel execution, CRM-connected lead management and AI-enabled optimisation. **Strategy and framework: 5** • 1: Tactical only; no structured funnel or lead qualification criteria. • 2: Basic targeting and optimisation approach. • 3-4: Clear funnel design and optimisation logic. • 5: Data-led methodology with defined MQL and SQL criteria, funnel stages, data and field requirements, testing frameworks and continuous AI optimisation. **Execution, integration and governance: 5** • 1 : Limited execution detail; no governance, integration or monitoring.	

Quality criteria	Sub criteria	Scoring	Maximum number of points
	support AI-assisted content creation and optimisation, track and analyse content performance and user behaviour, and enable continuous optimisation of messaging, targeting and SEO. Case studies should demonstrate measurable improvements in engagement, reach, conversion rates or lead quality. **For each case study, provide:** • Client overview and objectives: client profile and sector, business challenge, defined KPIs (for example lead targets, CPL, SQL conversion). • Strategy and approach: audience segmentation and funnel design, channel mix and media rationale, MQL and SQL qualification criteria, optimisation methodology. • Execution, integration and governance: campaign rollout and integration (landing pages, gated content, CRM, email), integration and testing approach with the client's technology function, reporting structure and performance monitoring, data governance and privacy controls, quality assurance and governance controls. • Measurable results: quantified outcomes (for example lead volumes, CPL, conversion rates, SQL progression), evidence of optimisation and impact on pipeline or ROI.	• 2 : Execution described; basic reporting; integration referenced but not evidenced. • 3-4: End-to-end rollout including landing pages, gated content, CRM and email integration and reporting. • 5 : Structured delivery model with documented integration to a client CRM, QA processes, UAT participation, dashboards, reporting cadence, POPIA and data governance controls and AI-supported optimisation. **Results and impact: 5** • 1 : No quantified results. • 2 : Basic performance metrics provided. • 3-4: Clear CPL, conversion and lead metrics. • 5: Demonstrated CPL optimisation, MQL to SQL progression, pipeline impact, and evidence of AI-enabled performance improvement.	
5. Personnel and experience	Please submit brief biographies of: • Management team • Key team members • Account management team	• Poor = 0 to 3 points • Average = 4 to 6 points • Good = 7 to 10 points	10

Quality criteria	Sub criteria	Scoring	Maximum number of points
	In table format, please submit the following for relevant employees who will be working on and supporting the DBSA account across all the services required: • Name • Position • Key responsibilities • Number of years working at your agency • Number of years total relevant experience • List of campaigns and clients the resource has worked on at your agency The proposed team must include the MarTech and CRM Integration Specialist, Marketing Automation and Lead Operations Specialist and Data Governance and Privacy Lead roles set out in the Eligibility Criteria. Where an individual is proposed for more than one role, the bidder must state the roles, time allocation and how capacity, continuity and quality will be maintained.		
Total			**70**

Presentation

Bidders who meet the threshold will be shortlisted to give a presentation to the bid evaluation committee. The presentation will be held virtually.

The presentation must be submitted as part of the bidder's initial tender submission. Bidders must submit all required documentation, including the presentation, by the tender closing date and time. No additional or revised submission documents may be provided after the tender has closed, unless formally requested through the applicable procurement process. Only bidders who meet the relevant stage-gate requirements and minimum thresholds will be invited to present. The presentation stage will be based on the information submitted in the bidder's tender response. Bidders may refine how they present their submitted content when invited to present, but they may not introduce new substantive information that was not included in their tender submission.

Criterion	Sub criteria	Scoring	Points
Presentation	• Company overview and profile • Experience and expertise in the relevant areas outlined in the Terms of Reference • Resources and account management approach • Evidence of understanding of the scope as stated in the Terms of Reference • At a high level, explain how you will support the DBSA in the development, planning and implementation of a digital and social media strategy • At a high level, explain how you will plug into the DBSA CRM and MarTech landscape implemented by ICT, and how leads will be captured, qualified, nurtured, handed over and reported • Overview of two relevant case studies or campaigns	• Poor = 0 to 14 points • Average = 15 to 20 points • Good = 21 to 30 points	**30**

ANNEXURE A

PRICING SCHEDULE

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

This template must be completed in full and included to Pricing Proposal submitted.

The expectations for pricing and contract options of this proposal are outlined below:

Pricing schedule

The DBSA is seeking a three-year retainer contract with a suitable service provider. Payment will be made monthly based on the resources and services used and will therefore vary according to the work done. The service provider is, however, expected to cater for emergencies, such as crisis communications, and may be required to work after hours or at short notice.

Bidders must structure their pricing submission to clearly separate the following cost categories. This is to ensure that bids are evaluated on a fair and comparable basis and that bidders clearly distinguish between professional services, paid media, production, multimedia content requirements, tools, licensing and logistics.

- Professional services retainer;
- Development Impact Campaign production budget;
- Development Impact Campaign media spend;
- Multimedia content production budget;
- Always-on and strategic maintenance media spend;
- Third-party tools, software, AI platforms and licensing costs;
- Travel, accommodation and logistics costs;
- Any optional or recommended additional costs.

The monthly professional services retainer must not include digital advertising spend, paid media placements, boosted or sponsored posts, Development Impact Campaign video production costs, multimedia content production costs, travel, accommodation and logistics, or third-party software, tools or licensing costs not already included in the bidder's own operating environment. Bidders must not include any cost for the CRM platform, its licences, its implementation or its hosting, as these are provided by DBSA ICT.

Professional services retainer

The professional services retainer must cover the recurring monthly services required to service the DBSA account on an ongoing basis. This may include, but is not limited to:

- Account management;
- Digital strategy support;
- Content planning and coordination;
- Campaign planning;
- Social media management;
- Copywriting and editorial support;
- Creative direction and design oversight;
- Community management support, where applicable;
- Performance monitoring and optimisation;
- Analytics and reporting;
- Search, social and content optimisation;
- Marketing operations support within the DBSA CRM environment, including campaign configuration, lead operations, taxonomy maintenance and data quality;
- Digital advisory support;
- Routine meetings and monthly reporting;
- Knowledge transfer and capacity-building support for DBSA's Marketing and Communications team.

Bidders must clearly indicate the proposed team structure, roles, responsibilities, estimated time allocation and deliverables included in the retainer. Integration support, user acceptance testing participation and documentation required under section 4.13 must be included within the retainer and must not be priced as a separate project fee.

Development Impact Campaigns: production and media

This TOR requires support for four (4) Development Impact Campaigns per annum. For pricing purposes, bidders must separate the costs associated with Development Impact Campaigns into two distinct categories: production costs and media spend.

Production budget. Bidders must provide a separate production budget covering all costs associated with the planning, filming, editing and delivery of the required Development Impact Campaign content outputs, excluding media spend and excluding travel, accommodation and logistics where project locations are not yet confirmed. The production budget must clearly indicate assumptions relating to: number of campaigns per annum; number of videos or content outputs per campaign; production approach; pre-production

requirements; crew requirements; filming days; editing and post-production; motion graphics, subtitles, animation or adaptation requirements; versions required for different digital platforms; turnaround times; and the review and revision process. Bidders must price this as a separate production workstream and not as part of the monthly professional services retainer.

Media spend. Bidders must provide indicative media budgets for the amplification of the four Development Impact Campaigns per annum. Each campaign must include a comprehensive, high-impact and performance-led media strategy aligned to DBSA's campaign objectives, audience priorities, development impact storytelling, lead generation and measurable conversion outcomes. For each campaign, bidders must provide: indicative media budget per campaign; recommended channel mix; audience targeting approach; media rationale; estimated spend distribution by channel; performance objectives; optimisation approach; and reporting methodology and key performance indicators. Media spend must be shown separately from both the professional services retainer and the production budget.

Multimedia content production budget

In addition to the Development Impact Campaigns, bidders must provide a separate budget for the four (4) multimedia content productions per quarter set out in section 4.2, namely two (2) productions under one (1) minute and two (2) productions under four (4) minutes. This must be treated as a distinct pricing category and must not be included in the professional services retainer or paid media budget.

Bidders must provide a unit price per production for each duration category, a quarterly total and an annual total, and must clearly state their assumptions, including: production approach; filming days and crew; whether filming, editing or both are included; whether animation, motion graphics, subtitles or adaptations are included; number of platform versions per production; number of revision rounds included; turnaround times; and any exclusions or dependencies.

For clarity: Development Impact Campaign video production must be priced separately; multimedia content production must be priced separately; media spend to promote either category must be priced separately; and travel, accommodation and logistics must be priced separately or treated in line with DBSA's travel arrangements.

Digital media spend

Digital advertising spend is separate from the professional services retainer and separate from production costs. Bidders must not include media buying, boosted posts, sponsored posts, tactical paid placements or advertising spend within the monthly professional services retainer.

All media-related costs must be itemised separately in the pricing submission (eight per quarter), supported by a clear media strategy and planning approach, linked to campaign objectives, channel mix, audience targeting and expected outcomes, and presented in a manner that allows like-for-like comparison across bidders.

Media spend will be planned and approved on a campaign-by-campaign or activity-by-activity basis. No media spend may be incurred without DBSA's prior written approval.

Always-on and strategic maintenance media

In addition to Development Impact Campaign media, bidders must make provision for ongoing always-on media support. For pricing and comparison purposes, bidders must provide for approximately four sponsored content placements, boosted posts or paid media placements per month. This may include sponsored posts across relevant DBSA digital platforms, tactical paid media placements, retargeting activity, lead nurturing activity, performance-driven optimisation and content amplification for priority institutional messages.

The always-on media component must be presented as a separate monthly media budget estimate. This budget is intended to support continuous visibility, audience engagement, stakeholder communication, content amplification and lead nurturing between larger campaign bursts. Bidders must clearly state the assumptions used, including proposed platforms, estimated frequency, indicative budget per placement and expected performance outcomes.

Third-party tools, platforms and licensing costs

Where a campaign, production approach, reporting framework or proposed solution requires third-party software, paid tools, platform subscriptions, paid messaging, WhatsApp-related costs, AI tools, automation tools, social listening tools or channel licensing, these costs must be disclosed and priced separately.

Such costs must not be included in the professional services retainer unless the bidder expressly states that the cost is already covered within its own operating environment and will not result in any additional cost to DBSA. Bidders must specify whether these costs are once-off, monthly recurring, usage-based, campaign-specific or optional recommended enhancements. DBSA reserves the right to approve, decline or defer any recommended platform, licensing or tool-related cost.

CRM licensing, CRM implementation, integration middleware and dashboard infrastructure are provided by DBSA ICT and must not be priced by bidders.

Travel, accommodation and logistics

Bidders are not required to include travel, accommodation and related logistics costs for infrastructure project site documentation as the final geographic locations are not yet confirmed. For pricing purposes, bidders must include production-related costs required to deliver the relevant video and content outputs, excluding travel, accommodation and related logistics.

Where travel is required, DBSA may manage travel, accommodation and related logistics through its internal travel processes or provide further written instruction to the appointed service provider. Bidders must clearly state all assumptions linked to production, including crew size, number of shoot days, locations, equipment, post-production and output requirements.

Media planning and approval process

All media spend will be planned and approved on a campaign-by-campaign or activity-by-activity basis. The appointed service provider will be required to submit a detailed media plan and budget to DBSA before execution. No media spend may be incurred without prior written approval from DBSA.

Each media plan must include: campaign or activity objective; target audience; channel mix; budget allocation; placement strategy; timing and flighting; performance targets; optimisation approach; and reporting framework. Media investment may be reviewed and adjusted based on campaign performance, DBSA priorities, budget availability and strategic requirements.

Professional fees

Bidders must provide a rate card that includes the rates for junior, middle, senior, director and managing director resources.

Rate card	Hourly rate	Monthly rate	Year 1	Year 2	Year 3
Junior					
Middle					
Senior					
Director					
Managing Director					

Pricing proposal

Taking into account the detailed scope outlined in this TOR, bidders must submit a fee proposal for years 1, 2 and 3 including detailed costings of the resources that you believe the DBSA will need, and include the number of hours you anticipate you will spend on this account on a monthly basis. It is envisaged that the outputs will include, but not be limited to, the following on a monthly basis.

Deliverable	Estimated frequency (minimum)
Digital Media Amplification and Audience Targeting	Always-on paid media strategy and optimisation across paid social, programmatic, display and search. Includes audience segmentation, retargeting,

Deliverable	Estimated frequency (minimum)
	AI-assisted bid optimisation and budget efficiency monitoring aligned to quarterly Development Impact campaigns.
Quarterly Integrated Campaign Amplification	Four (4) fully integrated, performance-driven Development Impact campaigns per annum (12 over 36 months), each supported by structured media allocation, SEO-optimised landing environments and measurable KPIs.
Performance Creative Adaptation	Minimum 4 strategic creative adaptation requests per month, focused on performance variants, audience customisation at scale and A/B testing for optimisation.
Multimedia Content Development	Four (4) productions per quarter: two (2) under one (1) minute and two (2) under four (4) minutes, aligned to quarterly Development Impact campaigns and always-on amplification. Includes platform-native versions and subtitled cutdowns.
SEO and AI-Optimised Search Visibility	Ongoing technical SEO, structured metadata, search-aligned content optimisation and AI-enhanced performance forecasting to strengthen discoverability.
CRM and MarTech Integration Support	Continuous marketing operations within the ICT-implemented CRM landscape, including touchpoint integration, campaign and lead configuration inputs, taxonomy maintenance, tracking and tag management, data quality checks, change control and regression testing after each release.
Lead Management and Nurture Operations	Always-on lead capture, scoring inputs, MQL and SQL qualification support, nurture journey execution, Frontline handover coordination and feedback loop management.
Data, Analytics and Optimisation Reporting	Monthly performance dashboards including reach, engagement, media efficiency, audience precision, SEO performance, lead volumes, MQL and SQL conversion, cost per qualified lead, ROMI, ROAS and optimisation recommendations. Minimum four (4) performance review meetings per month with written contact reports.
Platform and Landing Environment Support	Lead the design, build and optimisation of digital platforms and user experiences, including campaign landing pages, programme microsites (e.g. CEIA platforms), UX/UI enhancements, mobile optimisation and analytics implementation. Ensure platforms are user-centric, data-driven and conversion-focused. Deliver four (4) platform projects annually, consisting of one (1) extensive initiative, two (2) intermediate initiatives, and one (1) minor enhancement, aligned to business and programme objectives.

Deliverable	Estimated frequency (minimum)
Knowledge Transfer and Capability Uplift	Quarterly structured skills transfer sessions and ongoing enablement covering digital strategy, media optimisation, analytics, marketing automation and CRM-enabled lead management.

Recommended resources	Recommended hours per month	Monthly rate	Year 1	Year 2	Year 3

6 Production fees

Bidders must include, as separate line items, provision for production and third-party costs as outlined in this TOR for years 1, 2 and 3.

Third party costs	Year 1	Year 2	Year 3
Multimedia content development (four per quarter)			
Development Impact Campaign production			
Research			
Microsite development and maintenance			
Digital media (Development Impact Campaigns)			
Digital media (always-on and strategic maintenance)			
Third-party tools, software, AI platforms and licensing			
Other			

Bidders must ensure that all assumptions are clearly stated to allow DBSA to evaluate submissions fairly and consistently. Failure to clearly separate and quantify the relevant cost categories may affect DBSA's ability to evaluate the bid on a comparable basis.

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

FORM OF OFFER AND ACCEPTANCE (AGREEMENT)

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

RFP210/2026: Integrated Digital Marketing and Development Partner

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 B

SBD 4

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**

2.1.1If 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;

3.2I 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.

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.

3.4The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

3.5 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

Annexure C

SBD 6.1

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 (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	80/90
PREFERENCE POINTS	20/10
Total points for Price and Preference Points	**100**

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

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

2. DEFINITIONS

(a) **"tender"** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;

(b) **"price"** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;

(c) **"rand value"** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;

(d) **"tender for income-generating contracts"** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and

(e) **"the Act"** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

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

80/20 **or** **90/10**

$$Ps = 80\left(1 - \frac{Pt - P\,min}{P\,min}\right) \text{ or } \quad Ps = 90\left(1 - \frac{Pt - P\,min}{P\,min}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

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

3.2.1. POINTS AWARDED FOR PRICE

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

80/20 **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \text{ or } \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmax = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 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 *audi alteram partem* 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 F to their Bids, certified copies of all relevant CIPC registration documents listing all members with percentages, in the case of a close corporation

Annexure E

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

Annexure F

Bidders which submit Bids as an unincorporated joint venture, consortium or other association of persons are required to submit, as Annexure H, 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 I to their Bids, supporting documents to their responses to the Pre- Qualifying Criteria and Evaluation Criteria.

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

Annexure H

[General Conditions of Contract]

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

PLEASE NOTE FURTHER THAT ALL BIDDERS MUST ENSURE THAT THEY ARE WELL 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