

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: | RFP090/2026 |
| COMPULSORY BRIEFING SESSION DETAILS: | <u>Compulsory Briefing Session Registration Link 08 June 2026</u> |
| CLOSING DATE: | 19 June 2026 |
| CLOSING TIME: | 23H55 (Midnight) |
| PERIOD FOR WHICH BIDS ARE REQUIRED TO REMAIN OPEN FOR ACCEPTANCE: | 120 days |
| DESCRIPTION OF BID: | APPOINTMENT OF A INTERGRATED DIGITAL MARKETING AND DEVELOPMENT PARTNER |
| BID DOCUMENTS ELECTRONIC SUBMISSION: | <p>ELECTRONIC SUBMISSIONS</p> <p><u>INSTRUCTIONS:</u></p> <ul style="list-style-type: none"> ➤ Bidders are required to submit written requests for clarification via e-mail to <u>davidscm@dbsa.org</u> ONLY, quoting the RFP Number on the subject of the e-mail. This must be done three (3) working days before closing day of the bid including request for submission link. ➤ Bidders will thereafter receive a OneDrive Link to upload their submission documents electronically. ➤ Written requests for clarification will be considered up to and including <u>15 JUNE 2026 16:30</u> Johannesburg time. Requests received after this date may not be attended to. ➤ Any requests after the stipulated date and time may be disregarded. <p>NB: Electronic submission is encouraged for all bidders interested in this tender.</p> <p>Closing date of this RFP090/2026 is 19 JUNE 2026 before 23:55PM.</p> <p>No physical bids will be received or accepted at the DBSA offices</p> |
| 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

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**PART A
INVITATION TO BID**

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

BID NUMBER: RFP090/2026

DESCRIPTION: APPOINTMENT OF A INTERGRATED DIGITAL MARKETING AND DEVELOPMENT PARTNER

COMPULSORY BRIEFING: 08 JUNE 2026

COMPULSORY BRIEFING LINK


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

Closing time for the OneDrive Link submissions - **23h55 on the 19 JUNE 2026**


CLOSING DATE: 19 JUNE 2026


CLOSING TIME: 23H55PM

Name

 Bidder Name

Name

 Folder 1_Financial Proposal

 Folder 2_Technical Proposal

- a) It remains the bidder’s responsibility to ensure that the bid submission is uploaded using the correct bidder document and tender link.
- b) Should a bidder encounter an issue with the system, the bidder must provide sufficient evidence as proof of attempting to upload their submission before the cut-off time and the error received.
- c) Faxed, emailed bids will not be accepted, only an electronic submission received via the link will be accepted.
- d) It is therefore the responsibility of the bidder to request for a link to participate.
- e) The DBSA assumes no responsibility if a Bidder’s designated email address is not correct, or if there are technical challenges, including those with the Bidders computer, network, or internet service provider (ISP).

BID SUBMISSION LINK REQUESTS:

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

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

THE FOLLOWING PARTICULARS MUST BE FURNISHED (FAILURE TO DO SO MAY RESULT IN YOUR BID BEING DISQUALIFIED).

BIDDERS THAT ARE UNINCORPORATED CONSORTIA CONSISTING OF MORE THAN ONE LEGAL ENTITY MUST SELECT A LEAD ENTITY AND FURNISH THE DETAILS OF THE LEAD ENTITY, UNLESS OTHERWISE SPECIFIED.

| | |
|---|--|
| NAME OF BIDDER AND EACH ENTITY IN CONSORTIUM: | |
| POSTAL ADDRESS: | |
| STREET ADDRESS: | |
| CONTACT PERSON (FULL NAME): | |
| EMAIL ADDRESS: | |
| TELEPHONE NUMBER: | |
| FAX NUMBER: | |
| BIDDER REGISTRATION NUMBER OR REGISTRATION NUMBER OF EACH ENTITY IN CONSORTIUM | |
| BIDDER VAT REGISTRATION NUMBER OR VAT REGISTRATION | |

| | | | | |
|---|---|--|----|--|
| 1..1.1 ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES/WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF] | | | |
| 1..1.2 ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES/WORKS OFFERED? | <input type="checkbox"/> Yes <input type="checkbox"/> 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.) | | | | |
| NUMBER OF EACH ENTITY IN CONSORTIUM | | | | |
| BBBEE STATUS LEVEL VERIFICATION CERTIFICATE /BBBEE STATUS LEVEL SWORN AFFIDAVIT SUBMITTED? [TICK APPLICABLE BOX] | YES | | NO | |
| IF YES, WHO ISSUED THE CERTIFICATE? | | | | |
| REGISTERED WITH THE NATIONAL TREASURY CSD [TICK APPLICABLE BOX] | YES | | NO | |
| CSD REGISTRATION NUMBER | | | | |
| TAX COMPLIANCE STATUS PIN (TCS) NUMBER ISSUED BY SARS | | | | |

PART B
TERMS AND CONDITIONS FOR BIDDING

| |
|--|
| 1. BID SUBMISSION: |
| <p>1.1. BIDS MUST BE SUBMITTED ELECTRONICALLY BY THE STIPULATED TIME TO THE LINK PROVIDED. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.</p> <p>1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED – (NOT TO BE RE-TYPED)</p> <p>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.</p> <p>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.</p> |
| 2. TAX COMPLIANCE REQUIREMENTS |
| <p>2.1 ALL BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS IN THEIR COUNTRY OF RESIDENCE.</p> <p>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.</p> <p>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.</p> <p>2.4 SA BIDDERS' MAY ALSO SUBMIT A PRINTED TCS TOGETHER WITH THE BID.</p> <p>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.</p> <p>2.6 WHERE SA BIDDERS HAVE NO TCS AVAILABLE BUT ARE REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.</p> |
| 3. QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS |
| <p>3.1. IS THE BIDDER A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.2. DOES THE BIDDER HAVE A BRANCH IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.3. DOES THE BIDDER HAVE A PERMANENT ESTABLISHMENT IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>3.4. DOES THE BIDDER HAVE ANY SOURCE OF INCOME IN THE RSA? <input type="checkbox"/> YES <input type="checkbox"/> NO</p> <p>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.</p> |

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

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Annexure F: Certified copies of your CIPC company registration documents listing all members with percentages, in case of a lose corporation |
| <input type="checkbox"/> | <input type="checkbox"/> | Annexure G: Certified copies of latest share certificates, in case of a company. |
| <input type="checkbox"/> | <input type="checkbox"/> | Annexure H: (if applicable): A breakdown of how fees and work will be spread between members of the bidding consortium. |
| <input type="checkbox"/> | <input type="checkbox"/> | Annexure I: Supporting documents to responses to Pre-Qualifying Criteria and Functional Evaluation Criteria. |
| <input type="checkbox"/> | <input type="checkbox"/> | Annexure J: General Condition of Contract |
| <input type="checkbox"/> | <input type="checkbox"/> | 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 B.
- 1.9 **Closing Time** for the OneDrive Link submissions - 23h55 on the 19 June 2026 (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 C.
- 1.14 **Intellectual Property Rights** includes copyright and neighbouring rights, and all proprietary rights in relation to inventions (including patents) registered and unregistered trademarks (including service marks), registered designs, confidential information (including trade secrets and know how) and circuit layouts, and all other proprietary rights resulting from intellectual activity in the industrial, scientific, literary or artistic fields.
- 1.15 **PFMA** means the Public Finance Management Act, 1999.
- 1.16 **PPPFA** means the Preferential Procurement Policy Framework Act, 2000.
- 1.17 **PPPFA Regulations** means the Preferential Procurement Regulations, 2022 published in terms of the PPPFA.
- 1.18 **Pre-Qualifying Criteria** means the criteria set out in clause **Error! Reference source not found.** of this Part C.
- 1.19 **Price and Preferential Points Assessment** means the process described in clause **Error! Reference source not found.** of this Part C, as prescribed by the PPPFA.
- 1.20 **Proposed Contract** means the agreement including any other terms and conditions contained in or referred to in this 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 and Part D) including all annexures and any other documents so designated by the DBSA.
- 1.22 **SARS** means the South African Revenue Service.
- 1.23 **Services** means the services required by the DBSA, as specified in this RFP Part D.
- 1.24 **SLA** means Service Level Agreement.
- 1.25 **SOE** means State Owned Enterprise, as defined by the Companies' Act.
- 1.26 **Specification** means the conditions of tender set and any specification or description of the DBSA's requirements contained in this 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: 08 June 2026 – 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: 19 JUNE 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 C.
- 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 C.
- 5.4 The rules contained in this RFP Part C 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 12, in circumstances where the Bidder does not wish the DBSA to publish its response to the question to all Bidders.

12. UNAUTHORISED COMMUNICATIONS

- 12.1 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: Functionality and returnable submission separate from Folder 2: Pricing proposal submission | 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.

26.1.2 Second Stage – Functional criteria

Stage gate 1: Functional and technical evaluation

A minimum score of 70% is required to be considered for third stage of evaluation (price and preference evaluation).

| No | Stage Gate | Stage Gate Description |
|----|-----------------|--|
| 1 | Stage Gate 1(a) | Functional evaluations: a minimum score threshold score of 70% or higher out of 80 (49/ 70 points) is required to be considered for presentations. |
| 2 | Stage Gate 1(b) | Presentations: a minimum score threshold of 70% or higher (21 / 30 points) is required to be considered for price and preference. |
| 3 | Stage Gate 2 | A combined overall minimum score of 70% or higher out of 100 (functional evaluation – 49 points including presentation – 21 points) is required to progress to the Price and Preference evaluation. |

Stage Gates

Eligibility Criteria:

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

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 and the application of AI-enabled marketing tools where applicable.

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 | A minimum of 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/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' experience 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 2+ years' experience 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/Diploma in Graphic Design, Visual Communication or related field |
| Web Developer / UX Specialist | 8+ years in web development and UX design | Degree/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 |

Stage Gate 1 (a) – Functional evaluations: a minimum score threshold of 70 or higher out of 100 (49 / 70 points) is required to be considered for demonstrations or presentations.

TENDER EVALUATION & ADJUDICATION CRITERIA

| Quality criteria | Sub criteria | Scoring | Maximum number of points |
|---------------------------|--|---|--------------------------|
| 1. Company Profile | <p>A detailed overview of the organisation, including:</p> <ul style="list-style-type: none"> • Legal entity name, registration details and ownership structure • Years of operation (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) | <ul style="list-style-type: none"> •Poor = 0-4 points •Average = 5-6 points •Good = 7-10 points | 10 |
| 2. References | <ul style="list-style-type: none"> • 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 and/or social media 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. • 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. | <ul style="list-style-type: none"> • 1 Complete client reference provided = 1 point • 2 Complete client reference provided = 2 points • 3 Complete client reference provided = 3 points • 4 Complete client reference provided = 4 points • 5 Client reference provided = 5 points | 5 |

| | | | |
|---|--|---|------------------|
| <p>3. Understanding of Scope and Proposed Approach</p> | <p>Provide a detailed overview of how you will be able to support the DBSA and fulfill the services outlined in this TOR. Please include the following:</p> <p>1. Digital Strategy & Lead Generation</p> <p>Explain how you will:</p> <ul style="list-style-type: none"> • 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. • Integrate paid media, landing pages, gated content and direct marketing into a measurable conversion ecosystem. <p>Conversion & Nurture</p> <p>Detail your approach to:</p> <ul style="list-style-type: none"> • 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). • Reporting on conversion rates and cost per qualified engagement. <p>First Six Months Plan</p> <p>Provide a high-level roadmap covering:</p> <ul style="list-style-type: none"> • Digital audit and baseline metrics. | <p>Digital Strategy & Lead Generation 10</p> <p>Scoring Guide</p> <ul style="list-style-type: none"> • Poor (0–3): Generic strategy; no structured lead-generation framework • Adequate (4–6): Clear strategy with basic MQL/SQL tracking • Excellent (7–10): Robust, measurable full-funnel model with defined pipeline contribution <p>Conversion & Nurture Architecture 10</p> <p>Scoring Guide</p> <ul style="list-style-type: none"> • Poor (0–3): Limited conversion focus • Adequate (4–7): Defined conversion and segmentation model • Excellent (8–10): Structured conversion architecture with cost optimisation and measurable funnel tracking | <p>35</p> |
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| | <ul style="list-style-type: none"> • Launch of initial Development Impact campaign. • Activation of paid media and lead-generation frameworks. • Implementation of dashboards tracking MQL/SQL performance. <p>Measurement Framework</p> <p>Explain how you will:</p> <ul style="list-style-type: none"> • Define KPIs aligned to objectives. • Track lead volumes, conversion rates and ROI. • Provide executive dashboards linking digital activity to pipeline relevance. | <p>First Six Months Implementation Plan 5</p> <ul style="list-style-type: none"> • Scoring Guide <ul style="list-style-type: none"> • Poor (0–1): High-level or unclear roadmap • Adequate (2–3): Structured but limited activation detail • Excellent (4-5): Clear, measurable rollout plan with lead-generation activation <p>Measurement & Performance Framework 10</p> <p>Scoring Guide</p> <ul style="list-style-type: none"> • Poor (0–3): Basic awareness metrics only | |
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| | | <ul style="list-style-type: none"> • Adequate (4–6): Defined KPI and reporting framework • Excellent (7–10): Comprehensive measurement model linking digital activity to pipeline relevance and ROI | |
| <p>4. Demonstrable Experience</p> | <p>Demonstration of Relevant Expertise and Competencies</p> <p>Bidders must submit three (3) real-life case studies and/or campaigns demonstrating proven capability in delivering structured, measurable digital marketing programmes.</p> <p>The case studies must evidence expertise in:</p> <ol style="list-style-type: none"> 1. Integrated Digital Marketing with measurable lead generation (MQL/SQL) Demonstrate how qualified leads were generated, defined, tracked, and progressed through the funnel. 2. Performance-led Media Buying and conversion optimisation Demonstrate paid media strategy, targeting, optimisation approach, and cost-efficiency improvements (e.g., CPL, conversion rate uplift). 3. Full-funnel Digital Campaign Execution Demonstrate end-to-end delivery including landing pages, gated content, CRM integration, and direct marketing/nurture journeys. | <p>Relevance & Alignment¹⁰</p> <p>0–3: Not aligned to scope; no MQL/SQL, lead generation or AI enabled optimisation evidence.</p> <p>4–6: Partial alignment; limited MQL/SQL, lead generation or AI enabled optimisation integration.</p> <p>7–8: Strong alignment; measurable lead generation, MQL/SQL, and AI enabled optimisation evident.</p> <p>9–10: Fully integrated digital programmes with clear MQL/SQL tracking, performance media delivery, full funnel delivery and AI-enabled optimisation</p> <p>Strategy & Framework¹⁰</p> <p>0–3: Tactical only; no structured funnel or lead qualification criteria.</p> | <p>40</p> |

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| | <p>4. AI Content Strategy and performance optimisation Demonstrate the application of AI and data-driven tools to enhance digital content performance and campaign outcomes. Bidders should illustrate how AI was used to:</p> <ul style="list-style-type: none"> • Inform content strategy and audience insights • Support AI-assisted content creation and optimization • Track and analyse content performance and user behaviour • Enable continuous optimisation of messaging, targeting and SEO • Case studies should demonstrate measurable improvements in engagement, reach, conversion rates or lead quality. <p>For Each Case Study, Provide:</p> <p>1. Client Overview & Objectives</p> <ul style="list-style-type: none"> • Client profile and sector • Business challenge • Defined KPIs (e.g., lead targets, CPL, SQL conversion) <p>2. Strategy & Approach</p> <ul style="list-style-type: none"> • Audience segmentation and funnel design • Channel mix and media rationale • MQL/SQL qualification criteria • Optimisation methodology <p>3. Execution & Governance</p> <ul style="list-style-type: none"> • Campaign rollout and integration (landing pages, gated content, CRM, email) • Reporting structure and performance monitoring | <p>4–6: Basic targeting and optimisation approach.</p> <p>7–8: Clear funnel design and optimisation logic.</p> <p>9–10: Data-led methodology with defined MQL/SQL criteria, funnel stages, testing frameworks and, and continuous AI optimisation.</p> <p>Execution & Governance (10 Points)</p> <p>0–3: Limited execution detail; no governance or monitoring.</p> <p>4–6: Execution described; basic reporting.</p> <p>7–8: End-to-end rollout incl. landing pages, gated content, CRM/email integration and reporting.</p> <p>9–10: Structured delivery model with QA processes, dashboards, reporting cadence, compliance controls and AI-supported optimisation</p> <p>Results & Impact</p> <p>0–3: No quantified results.</p> <p>4–6: Basic performance metrics provided.</p> <p>7–8: Clear CPL, conversion, and lead metrics.</p> <p>9–10: Demonstrated CPL optimisation, MQL→SQL</p> | |
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| | <ul style="list-style-type: none"> Quality assurance and governance controls <p>4. Measurable Results</p> <ul style="list-style-type: none"> Quantified outcomes (e.g., lead volumes, CPL, conversion rates, SQL progression) Evidence of optimisation and impact on pipeline or ROI | progression, pipeline impact, and evidence of AI-enabled performance improvement. | |
| 5. Personnel and Experience | <p>Please submit the following:</p> <p>Brief biographies of</p> <ul style="list-style-type: none"> Management team Key team members Account management team <p>In table format, please submit the following for relevant employees who will be working and supporting the DBSA across all the services required.</p> <ul style="list-style-type: none"> Name Position Key responsibilities Number of years working at your agency Number of years total relevant experience List of campaigns/clients' resource has worked on at your agency | <p>Scoring:</p> <ul style="list-style-type: none"> Poor= 0 – 4 points Average = 5- 6 points Good= 7- 10 points | 10 |
| Total | | 100 | |
| Threshold | | 70 | |

**Stage Gate 1(b) Presentation**

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

| | | | |
|---------------------|--|-----------|-----------|
| Presentation | <ul style="list-style-type: none"> •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 •Overview of two relevant case studies/campaigns <p>Scoring</p> <ul style="list-style-type: none"> •Poor = 0 – 14 points •Average = 15 – 20 points •Good = 21 – 30 points | 30 | 30 |
| Threshold | | 70% | |

26.1.3 Third Stage – price

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

26.1.3.2 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

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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 ;

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- 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.

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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.

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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.

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- 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).

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Terms of Reference

Integrated Digital Marketing and Development Partner

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1. Introduction

The Development Bank of Southern Africa (the “DBSA” or the “Bank”) primarily plays a key role in the planning, preparation, funding, building and maintenance phases of the infrastructure development value chain. All the value chain components incorporate fundamental administrative activities such as documentation, procurement, and reporting. The diagram below illustrates our infrastructure value chain, numerous services, and key target markets per value chain segments

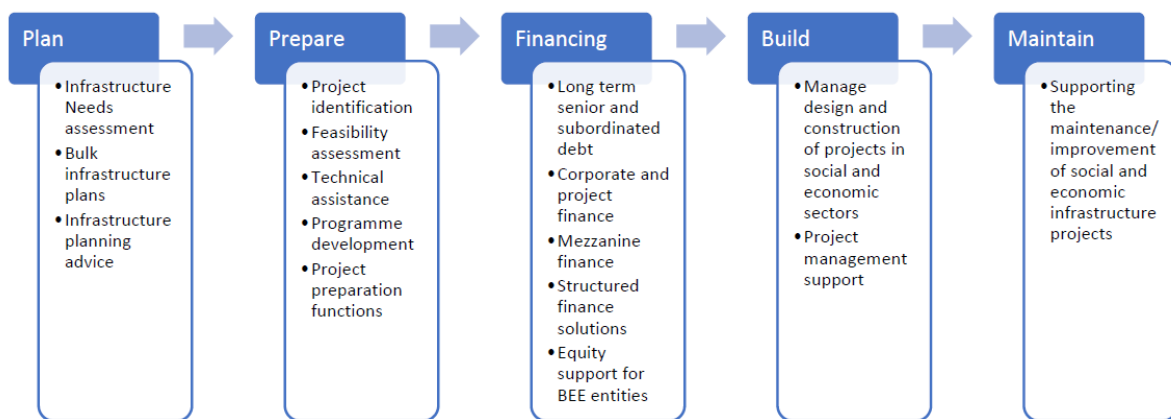


FIGURE 1: DBSA VALUE CHAIN

South Africa has concluded various binational and trade agreements with countries across the continent to support broader regional integration in line with the SADC (Southern African Development Community) Integrated Infrastructure Development Plan, the Programme for Infrastructure Development in Africa (PIDA) and AU (African Union) Africa Agenda 2063. The regional development and integration strategy of the DBSA is aimed at both SADC and the rest of Africa.



TERMS OF REFERENCE

- **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 & Communications (M&C) Strategy, DBSA requires a coordinated, performance-led and innovative-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.

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, governance framework, performance measurement approach and indicative timelines for delivery across the contract period.

Organisational Overview

- **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.

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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 suitable 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.

A significant and mandatory component of this TOR includes:

- Systematic, high-quality project site documentation across priority sectors, capturing infrastructure delivery from preparation through to implementation and impact. This includes professional photography, 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

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- Continuous performance tracking, dashboard reporting and optimisation linked to measurable outcomes

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 & Communications Unit (M&C)**

The appointed service provider will work closely with DBSA's Marketing & Communications (M&C) Unit, situated within the Strategy, Economics and Sustainability Division.

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 and performance optimisation.

- **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 & 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:

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- 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 and visibility.
- 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.

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- **Robust analytics and performance reporting**, linking digital activity to awareness, engagement, investor confidence and pipeline relevance.

All execution must adhere to DBSA's governance standards, brand guidelines 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 and project sponsors
- Private sector partners and infrastructure developers
- Media and thought leadership platforms
- Civil society and community stakeholders
- Corporate Social Investment (CSI) beneficiaries
- Youth (18–35), particularly those interested in infrastructure, sustainability and development careers
- Current and prospective employees
- Regional partners across the Rest of Africa
- 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 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.

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- **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

- **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 & 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 & 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 and AI-optimised performance enhancement. 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 search visibility
- Always-on Development Impact storytelling
- Structured project site documentation and cinematic multimedia production
- Social media management and community engagement

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- Reputation, issues and crisis management within digital environments
- Analytics, reporting and performance governance
- Creative design systems and scalable digital asset production

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. Photography and professional site documentation across DBSA projects and events will form a mandatory component of the scope.

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 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 & Communications (M&C) Strategy.

KPIs will be structured across four 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) **Governance, Collaboration and Capability Uplift**

Effective account management, budget adherence, reporting discipline, crisis responsiveness and structured skills transfer to the M&C Unit.

**Scope of Work:**

Deliverable specification with output detail and indicative timelines

Note: All timelines are indicative minimums based on standard South African working conditions (Monday to Friday, excluding South African public holidays as gazetted under the Public Holidays Act No. 36 of 1994). Lead times exclude the December–early January reduced-capacity period (15 December to 10 January) and the Easter long weekend, during which extended turnarounds apply. Critical campaigns or unplanned briefs may require accelerated turnarounds, agreed in writing per project. All deliverables are subject to a maximum of three (3) rounds of revision unless otherwise specified.

- All outputs will be managed and delivered through a shared Digital Asset Management (DAM) system, ensuring robust version control, structured governance, and consistent naming conventions across all content and campaign assets. Delivery will be supported by a dedicated account team comprising clearly assigned leads across strategy, creative, media, data analytics, and production to ensure accountability, continuity, and streamlined collaboration throughout the engagement.
- Every deliverable will undergo a rigorous quality assurance process prior to release, including brand alignment checks, copy-editing, fact verification, and accessibility compliance to ensure all outputs meet the highest professional and institutional standards. Any requests falling outside the agreed scope of work will be formally assessed, scoped, and costed for approval before production commences, ensuring transparency and effective project governance.
- Any Service Level Agreement (SLA) breaches will be transparently documented within the monthly contact report, together with a clear corrective action plan outlining mitigation measures and continuous improvement interventions.
- The engagement will operate on an always-on model, with continuous daily execution, weekly optimisation and monitoring, and consolidated monthly performance reporting to support agility, responsiveness, and sustained impact. Each revision cycle will accommodate one consolidated round of client feedback submitted within the agreed two (2) working day feedback window. Feedback received beyond this timeframe may impact downstream production schedules and agreed delivery timelines.

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- **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 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. Continuous collaboration with other agencies and vendors will be required to ensure message consistency and platform coherence.

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- **4.2 Photography, Videography and Structured Project Documentation**

Structured project documentation is a mandatory component of this TOR.

The service provider will be responsible for sourcing, appointing and managing relevant sub-contractors to deliver professional videography and photography services. All associated production costs — including conceptualisation, scripting, travel, crew, pre- and post-production, editing, animation and licensing, must be incorporated within the pricing submission.

As a guideline, bidders should make provision for an average of three events per month requiring live coverage, videography and/or photography for digital platforms.

The service provider must deliver:

- High-quality documentary-style footage of DBSA-funded projects across sectors.
- Short-form video clips and animation optimised for digital distribution.

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- Campaign-based digital video production aligned to Development Impact themes.
- Creative concept development for promotional and institutional storytelling.
- Licensing management and intellectual property compliance.
- Access to relevant stock imagery and footage where required.

Live social coverage of selected DBSA events must be supported by rapid content turnaround and platform-specific adaptation.

- **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

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 retail-like campaign environments.

- **4.5 Budget Management**

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

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This includes preparation of Capital Expenditure (CE) 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.

| Deliverable | Estimated Frequency (Minimum) | Output Deliverables (Detail) | Timelines |
|---|--|---|--|
| Digital Media Amplification & Audience Targeting | Always-on paid media strategy and optimisation across paid social, programmatic, display and search. Includes audience segmentation, retargeting, AI-assisted bid optimisation and budget efficiency monitoring aligned to quarterly Development Impact campaigns. | <p>Monthly output includes:</p> <ul style="list-style-type: none"> • Media plan: channel-by-channel paid media plan with budget allocation and audience segments • Audience taxonomy: documented audience cohorts (lookalikes, retargeting pools, custom segments) refreshed monthly • Campaign builds: live campaigns across Meta, LinkedIn, Google (Search, Display, YouTube), programmatic DSP • Optimisation log: weekly bid, creative, and audience adjustments with rationale • Budget pacing report: weekly spend-vs-plan tracker with reforecast • Performance summary: end-of-month performance deck with CPM, CPC, CTR, CPA, ROAS and audience precision metrics | <ul style="list-style-type: none"> • Setup: Weeks 1–3 (onboarding, pixel/tag audit, audience build) • Go-live: Week 4 • Always-on cadence: Daily monitoring; weekly optimisation; monthly reporting (5th working day of following month) • Quarterly review: Within 10 working days of quarter-end |

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| Deliverable | Estimated Frequency (Minimum) | Output Deliverables (Detail) | Timelines |
|---|--|---|--|
| <p>Quarterly Integrated Campaign Amplification</p> | <p>Six (6) fully integrated, performance-driven Development Impact campaigns per annum (18 over 36 months), each supported by structured media allocation, SEO-optimised landing environments and measurable KPIs.</p> | <p>Per-campaign output includes:</p> <ul style="list-style-type: none"> • Campaign strategy brief: objectives, audience, messaging architecture, KPIs, success metrics • Creative concept: campaign idea, key visual, copy platform, tone-of-voice guide (3 routes presented; 1 selected) • Channel plan: integrated paid, owned, earned roadmap with budget split • Asset suite: hero film, cutdowns, static creatives, social variants, banners, landing page, scripts • Landing environment: SEO-optimised campaign landing page with conversion tracking • Launch plan: go-to-market timeline, channel sequencing, internal comms cascade • Post-campaign report: performance vs KPIs, audience insights, recommendations for next quarter | <ul style="list-style-type: none"> • Strategy & concept: Weeks 1–3 of quarter • Client approval gate: End of Week 3 • Production & build: Weeks 4–7 • Campaign in-market: Weeks 8–12 • Post-campaign report: Within 15 working days of campaign close • Cadence: 6 campaigns per annum |
| <p>Performance Creative Adaptation</p> | <p>Minimum 6 strategic creative adaptation requests per month, focused on performance variants, audience customisation at scale, and A/B testing for optimisation.</p> | <p>Per adaptation request includes:</p> <ul style="list-style-type: none"> • Creative brief response: interpretation of performance data into creative hypothesis • Variant pack: minimum 3 creative variants per request (copy, visual, CTA) • Platform-native sizing: all variants resized for active platforms | <ul style="list-style-type: none"> • Request to first proof: 2 working days • First-round revisions: Within 1 working day of feedback • Final delivery: Within 4 working days of brief |

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| Deliverable | Estimated Frequency (Minimum) | Output Deliverables (Detail) | Timelines |
|---|--|--|---|
| | | <p>(Meta 1:1, 4:5, 9:16; LinkedIn 1.91:1; YouTube 16:9, 9:16)</p> <ul style="list-style-type: none"> • A/B test plan: hypothesis, success metric, test duration, sample size • Test results report: winning variant, statistical confidence, learnings to apply forward • Versioned asset library: delivered to shared DAM/drive with naming convention | <ul style="list-style-type: none"> • Test in-market: Minimum 7 days per A/B test • Results report: Within 3 working days of test conclusion • Cadence: Minimum 6 requests per month |
| <p>Photography (Campaign & Impact Documentation)</p> | <p>0–3 assignments per quarter, prioritised for Development Impact storytelling, executive positioning and campaign amplification.</p> | <p>Per shoot outputs include:</p> <ul style="list-style-type: none"> • Shoot brief: creative direction, shot list, location plan, talent/subject coordination • Production schedule: call sheet, crew, equipment, permissions and consent forms • Edited image library: minimum 30 hero-quality images per assignment, colour-graded and retouched • Format variants: supplied in high-res (print) and web-optimised (multiple aspect ratios) • Behind-the-scenes content: 5–10 BTS images for social/internal use • Caption pack: suggested captions and alt-text for each hero image • Rights documentation: signed model and location releases delivered with assets | <ul style="list-style-type: none"> • Brief to shoot date: 10–15 working days lead time • First selects: Within 3 working days of shoot • Final edited library: Within 10 working days of shoot • BTS content: Within 5 working days of shoot • Cadence: Up to 3 assignments per quarter |



| Deliverable | Estimated Frequency (Minimum) | Output Deliverables (Detail) | Timelines |
|---|--|---|---|
| Cinematic Video & Motion Assets | 0–4 productions per quarter, aligned to quarterly campaigns and always-on Development Impact amplification. Includes platform-native edits and performance-ready cutdowns. | <p>Per production outputs include:</p> <ul style="list-style-type: none"> • Pre-production: concept, treatment, script, storyboard, shot list, location recce • Hero film: 1 master edit (60–120 sec) in broadcast-quality 4K • Platform cutdowns: 15-sec, 30-sec, and 6-sec variants per platform (Meta, LinkedIn, YouTube, TikTok where relevant) • Aspect ratio variants: 16:9 (YouTube), 9:16 (Stories/Reels), 1:1 (feed), 4:5 (feed) • Motion graphics: supers, lower-thirds, end-frame, accessibility-friendly captions • Versions: captioned (for autoplay), sound-on, and subtitled variants • Source files: delivered with project files, b-roll, and licensed music rights | <ul style="list-style-type: none"> • Pre-production: Weeks 1–2 • Production/shoot: Week 3 • Post-production round 1: Week 4 (first cut delivered) • Revisions: Weeks 5–6 (max 3 rounds) • Final delivery: Week 7 (5–7 weeks from brief to broadcast-ready) • Cadence: Up to 4 productions per quarter |
| SEO & AI-Optimised Search Visibility | Ongoing technical SEO, structured metadata, search-aligned content optimisation and AI-enhanced performance forecasting to strengthen discoverability. | <p>Monthly outputs include:</p> <ul style="list-style-type: none"> • Technical SEO audit: monthly site health report (Core Web Vitals, crawl errors, schema) • Keyword strategy: quarterly keyword research aligned to campaign themes and brand pillars • On-page optimisation: metadata, headers, internal linking and structured data updates | <ul style="list-style-type: none"> • Baseline audit: Weeks 1–4 (technical, content, backlink, competitor benchmark) • Monthly cycle: Audit fixes by 10th; optimisation by 20th; reporting by 5th of following month • Quarterly strategy refresh: Within 10 working days of quarter-end |

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| Deliverable | Estimated Frequency (Minimum) | Output Deliverables (Detail) | Timelines |
|---|---|---|--|
| | | <ul style="list-style-type: none"> • Content briefs: minimum 4 SEO-driven content briefs per month for content team • AI search readiness: optimisation for generative search (Google AI Overviews, Perplexity, ChatGPT citations) • Forecasting model: quarterly traffic and ranking forecast with sensitivity analysis • Performance report: monthly rankings, organic traffic, share of search, conversion contribution | <ul style="list-style-type: none"> • Forecast update: Quarterly |
| Data, Analytics & Optimisation Reporting | <p>Monthly performance dashboards including reach, engagement, media efficiency, audience precision, SEO performance and optimisation recommendations. Minimum four (4) performance review meetings per month with written contact reports.</p> | <p>Monthly outputs include:</p> <ul style="list-style-type: none"> • Live dashboard: always-on Looker Studio / Power BI dashboard with daily data refresh • Monthly performance report: consolidated PDF/deck across all channels with executive summary • Insight & recommendations: narrative section translating data into actions, not just metrics • Optimisation log: actions taken in the period and their measured impact • Contact reports: written report from each of the 4 weekly performance review meetings • Quarterly review: deeper-cut analysis vs strategic KPIs, share of voice, sentiment, brand health proxies | <ul style="list-style-type: none"> • Dashboard setup: Weeks 1–4 • Dashboard live: Week 5 • Weekly review meetings: Every Tuesday (or agreed day); contact report within 24 hours • Monthly report: Delivered by 5th working day of following month • Quarterly review: Within 10 working days of quarter-end • Annual review: Within 20 working days of year-end |

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| Deliverable | Estimated Frequency (Minimum) | Output Deliverables (Detail) | Timelines |
|---|---|---|---|
| | | <ul style="list-style-type: none"> • Annual review: year-on-year performance with ROI analysis and next-year recommendations | |
| Platform & Landing Environment Support | Continuous optimisation of campaign landing pages, microsites and digital environments (including CEIA platforms) to improve UX, conversion pathways and analytics integration. | Outputs include: <ul style="list-style-type: none"> • UX/CRO audit: quarterly audit of conversion funnels, heatmaps, and user journey friction • Landing page builds: per campaign, with conversion-optimised design and tested CTAs • A/B testing programme: ongoing landing page experiments with documented hypotheses and results • Analytics integration: GA4, tag manager, conversion tracking, server-side tracking where applicable • Accessibility compliance: WCAG 2.1 AA standards across all builds • Speed & technical health: monthly Core Web Vitals report and remediation • Maintenance log: documented updates, bug fixes, and performance interventions | <ul style="list-style-type: none"> • Audit: Weeks 1–3 • Landing page builds: 10–15 working days per page (brief to live) • CRO experiments: Monthly test cycle (build → test → analyse → implement) • Maintenance SLA: Critical fixes within 4 hours; standard updates within 3 working days • Quarterly UX review: Within 10 working days of quarter-end |

Eligibility Criteria:

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

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:

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- 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 and the application of AI-enabled marketing tools where applicable.

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 | A minimum of 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/Diploma in Creative Design, Visual Communication or related field |

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|--|---|--|
| 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' experience 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 2+ years' experience 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/Diploma in Graphic Design, Visual Communication or related field |
| Web Developer / UX Specialist | 8+ years in web development and UX design | Degree/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 |

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TENDER EVALUATION & ADJUDICATION CRITERIA

| Quality criteria | Sub criteria | Scoring | Maximum number of points |
|---------------------------|--|---|--------------------------|
| 1. Company Profile | <p>A detailed overview of the organisation, including:</p> <ul style="list-style-type: none"> • Legal entity name, registration details and ownership structure • Years of operation (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) | <ul style="list-style-type: none"> • Poor = 0-4 points • Average = 5-6 points • Good = 7-10 points | 10 |
| 2. References | <ul style="list-style-type: none"> • 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 and/or social media 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. • 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. | <ul style="list-style-type: none"> • 1 Complete client reference provided = 1 point • 2 Complete client reference provided = 2 points • 3 Complete client reference provided = 3 points • 4 Complete client reference provided = 4 points • 5 Client reference provided = 5 points | 5 |

| | | | |
|---|--|--|------------------|
| <p>3. Understanding of Scope and Proposed Approach</p> | <p>Provide a detailed overview of how you will be able to support the DBSA and fulfill the services outlined in this TOR. Please include the following:</p> <p>1. Digital Strategy & Lead Generation</p> <p>Explain how you will:</p> <ul style="list-style-type: none"> • 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. • Integrate paid media, landing pages, gated content and direct marketing into a measurable conversion ecosystem. <p>Conversion & Nurture</p> <p>Detail your approach to:</p> <ul style="list-style-type: none"> • 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). • Reporting on conversion rates and cost per qualified engagement. <p>First Six Months Plan</p> <p>Provide a high-level roadmap covering:</p> <ul style="list-style-type: none"> • Digital audit and baseline metrics. • Launch of initial Development Impact campaign. • Activation of paid media and lead-generation frameworks. | <ul style="list-style-type: none"> • Digital Strategy & Lead Generation 10 <p>Scoring Guide</p> <ul style="list-style-type: none"> • Poor (0–3): Generic strategy; no structured lead-generation framework • Adequate (4–6): Clear strategy with basic MQL/SQL tracking • Excellent (7–10): Robust, measurable full-funnel model with defined pipeline contribution <ul style="list-style-type: none"> • Conversion & Nurture Architecture 10 • Scoring Guide • Poor (0–3): Limited conversion focus • Adequate (4–7): Defined conversion and segmentation model • Excellent (8–10): Structured conversion architecture with cost optimisation and measurable funnel tracking | <p>35</p> |
|---|--|--|------------------|

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| | | | |
|--|---|---|--|
| | <ul style="list-style-type: none"> • Implementation of dashboards tracking MQL/SQL performance. <p>Measurement Framework</p> <p>Explain how you will:</p> <ul style="list-style-type: none"> • Define KPIs aligned to objectives. • Track lead volumes, conversion rates and ROI. • Provide executive dashboards linking digital activity to pipeline relevance. | <p>First Six Months Implementation Plan 5</p> <ul style="list-style-type: none"> • Scoring Guide • Poor (0–1): High-level or unclear roadmap • Adequate (2–3): Structured but limited activation detail • Excellent (4–5): Clear, measurable rollout plan with lead-generation activation <ul style="list-style-type: none"> • Measurement & Performance Framework 10 <p>Scoring Guide</p> <ul style="list-style-type: none"> • Poor (0–3): Basic awareness metrics only • Adequate (4–6): Defined KPI and reporting framework • Excellent (7–10): Comprehensive measurement model linking digital | |
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| | | <p>activity to pipeline relevance and ROI</p> | |
| <p>4. Demonstrable Experience</p> | <p>Demonstration of Relevant Expertise and Competencies</p> <p>Bidders must submit three (3) real-life case studies and/or campaigns demonstrating proven capability in delivering structured, measurable digital marketing programmes.</p> <p>The case studies must evidence expertise in:</p> <ul style="list-style-type: none"> 5. Integrated Digital Marketing with measurable lead generation (MQL/SQL) Demonstrate how qualified leads were generated, defined, tracked, and progressed through the funnel. 6. Performance-led Media Buying and conversion optimisation Demonstrate paid media strategy, targeting, optimisation approach, and cost-efficiency improvements (e.g., CPL, conversion rate uplift). 7. Full-funnel Digital Campaign Execution Demonstrate end-to-end delivery including landing pages, gated content, CRM | <p>Relevance & Alignment¹⁰</p> <p>0–3: Not aligned to scope; no MQL/SQL, lead generation or AI enabled optimisation evidence.</p> <p>4–6: Partial alignment; limited MQL/SQL, lead generation or AI enabled optimisation integration.</p> <p>7–8: Strong alignment; measurable lead generation, MQL/SQL, and AI enabled optimisation evident.</p> <p>9–10: Fully integrated digital programmes with clear MQL/SQL tracking, performance media delivery, full funnel delivery and AI-enabled optimisation</p> <p>Strategy & Framework¹⁰</p> <p>0–3: Tactical only; no structured funnel or lead</p> | <p>40</p> |



| | | | |
|--|---|--|--|
| | <p>integration, and direct marketing/nurture journeys.</p> <p>8. AI Content Strategy and performance optimisation Demonstrate the application of AI and data-driven tools to enhance digital content performance and campaign outcomes. Bidders should illustrate how AI was used to:</p> <ul style="list-style-type: none"> • Inform content strategy and audience insights • Support AI-assisted content creation and optimization • Track and analyse content performance and user behaviour • Enable continuous optimisation of messaging, targeting and SEO • Case studies should demonstrate measurable improvements in engagement, reach, conversion rates or lead quality. <p>For Each Case Study, Provide:</p> <p>1. Client Overview & Objectives</p> <ul style="list-style-type: none"> • Client profile and sector • Business challenge • Defined KPIs (e.g., lead targets, CPL, SQL conversion) <p>2. Strategy & Approach</p> <ul style="list-style-type: none"> • Audience segmentation and funnel design • Channel mix and media rationale • MQL/SQL qualification criteria • Optimisation methodology <p>3. Execution & Governance</p> <ul style="list-style-type: none"> • Campaign rollout and integration (landing pages, gated content, CRM, email) • Reporting structure and performance monitoring • Quality assurance and governance controls <p>4. Measurable Results</p> | <p>qualification criteria.</p> <p>4–6: Basic targeting and optimisation approach.</p> <p>7–8: Clear funnel design and optimisation logic.</p> <p>9–10: Data-led methodology with defined MQL/SQL criteria, funnel stages, testing frameworks and, and continuous AI optimisation.</p> <p>Execution & Governance (10 Points)</p> <p>0–3: Limited execution detail; no governance or monitoring.</p> <p>4–6: Execution described; basic reporting.</p> <p>7–8: End-to-end rollout incl. landing pages, gated content, CRM/email integration and reporting.</p> <p>9–10: Structured delivery model with QA processes, dashboards, reporting cadence, compliance controls and AI-supported optimisation</p> <p>Results & Impact</p> <p>0–3: No quantified results.</p> <p>4–6: Basic performance metrics provided.</p> <p>7–8: Clear CPL, conversion, and lead metrics.</p> <p>9–10: Demonstrated CPL optimisation, MQL→SQL progression, pipeline impact, and evidence of AI-</p> | |
|--|---|--|--|

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| | | | |
|---|--|--|-----------|
| | <ul style="list-style-type: none"> • Quantified outcomes (e.g., lead volumes, CPL, conversion rates, SQL progression) • Evidence of optimisation and impact on pipeline or ROI | enabled performance improvement. | |
| 5. Personnel and Experience | <p>Please submit the following:</p> <p>Brief biographies of</p> <ul style="list-style-type: none"> •Management team •Key team members •Account management team <p>In table format, please submit the following for relevant employees who will be working and supporting the DBSA across all the services required.</p> <ul style="list-style-type: none"> •Name •Position •Key responsibilities •Number of years working at your agency •Number of years total relevant experience •List of campaigns/clients' resource has worked on at your agency | <p>Scoring:</p> <ul style="list-style-type: none"> •Poor= 0 – 4 points •Average = 5- 6 points •Good= 7- 10 points | 10 |
| Total | | 100 | |
| Threshold | | 70 | |
| Bidders who meet the threshold will be shortlisted to give a presentation to the bid evaluation committee. The presentation will be held virtually | | | |

□

| | | | |
|---------------------|--|-----------|-----------|
| Presentation | <ul style="list-style-type: none"> •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 •Overview of two relevant case studies/campaigns <p>Scoring</p> <ul style="list-style-type: none"> •Poor = 0 – 14 points •Average = 15 – 20 points •Good = 21 – 30 points | 30 | 30 |
| Threshold | | 70% | |

Second Stage – Functional criteria

Only those Bidders who scores a minimum **[49 out of 70]** points or higher during stage 1(a) of the functional evaluation will be shortlisted for presentation evaluation, bidders who score a minimum of **[21 out of 30]** points will proceed to price and preference evaluation stage. Bidders are required to submit supporting documentation evidencing their compliance with each requirement, where applicable.

Reservations

The DBSA expressly reserves the following rights:

- To appoint more than one service provider.
- To waive any or all irregularities in the proposals submitted.
- To retain the right not to select any service provider.
- To cancel the request for proposals.

Confidentiality and Intellectual Property

Information contained in this Request for Proposals is confidential and is the property of the DBSA. Similarly, the Bank shall hold all property rights such as copyright, patents and registered trademarks on matters related to or derived from the work carried out through this contract.

□

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 DBSA is seeking a three-year retainer contract with a suitable service provider. Payment will be made monthly based on the specific resources and services used and therefore payment will vary monthly depending on the work done. It is, however, expected that the service provider cater for emergencies e.g. to deal with crisis communications and in such situations may be expected to work after hours or at short notice.

In your pricing submission please include the following:

Professional fees:

- Please provide your rate card which includes the rates for junior, middle, senior and director, managing director resources.

| Professional Fees | | | | | |
|-------------------|-------------|--------------|------------------------|--------|--------|
| Rate Card | Hourly Rate | Monthly Rate | Annual Rate: Year 1 | Year 2 | Year 3 |
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |

Pricing Proposal

Taking into account the detailed scope outlined in these terms of reference document, please submit a fee proposal for year 1, 2 and 3 including detailed costings of the resources that you believe that the DBSA will need and also include the number of hours you anticipate you will spend on this account on a monthly basis. It is expected that the output will include (but not be limited to) the following on a monthly basis.

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NOTE: Any yearly escalations (if applicable) should be included and clearly specified in the pricing details.

CONFIDENTIALITY AND INTELLECTUAL PROPERTY

Information contained in this Request for Proposals is confidential and is the property of the DBSA. Similarly, the Bank shall hold all property rights such as copyright, patents and registered trademarks on matters directly related to or derived from the work carried out through this contract.

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:

RFP090/2026: APPOINTMENT OF AN 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** _____

BIDDER’S DISCLOSURE

1. PURPOSE OF THE FORM

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

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

2. Bidder’s declaration

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

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

| Full Name | Identity Number | Name of State institution |
|-----------|-----------------|---------------------------|
| | | |
| | | |
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| | | |
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| | | |
| | | |
| | | |
| | | |

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

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

2.2.1 If so, furnish particulars:
.....
.....

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

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

2.3.1 If so, furnish particulars:
.....
.....

3 DECLARATION

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

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

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.

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.

SBD 4

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:

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

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = Price of lowest acceptable tender

3.2. 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:

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

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 | <p>Is the bidder or any of its directors listed on the National Treasury’s Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>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.</p> | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| 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 <input type="checkbox"/> | No <input type="checkbox"/> |
| 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 <input type="checkbox"/> | No <input type="checkbox"/> |
| 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 <input type="checkbox"/> | No <input type="checkbox"/> |
| 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 ACQUAINTED 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**