



REQUEST FOR PROPOSAL (RFP)

**SERVICES OF FIRMS/INDIVIDUALS
SPECIALIZING IN
DIGITAL MARKETING, PROMOTION & PR
SOLUTIONS**

SECTION-1

REQUEST FOR PROPOSAL

SERVICES OF FIRMS/INDIVIDUALS SPECIALIZING IN DIGITAL MARKETING PROMOTION & PR SOLUTIONS

1. Central Depository Company of Pakistan Limited invites proposals/ bids from firms/individuals specializing in Digital Marketing, Promotion & PR solutions.
2. Single Stage Two Envelop Procedure will be used for open competitive bidding. Interested bidders shall submit their sealed proposals/ bids comprising single package containing two separate envelopes. Each envelope shall contain separately the 'financial' and 'technical (marketing & PR plan) proposal which will be clearly mentioned in bold and legible letters on respective envelopes to avoid any confusion.
3. Sealed Bids must reach even ones mailed through courier, addressing Mr. Muhammad Taha Tungekar – Deputy Manager Marketing, CDC Office, Central Depository Company of Pakistan Limited, CDC House, Block B, S.M.C.H.S., Shakra-e-Faisal, Karachi or email at taha_tungekar@cdcpak.com **on or before 3:30pm on 20th September 2021.**
4. Bid Envelop should mention "BID FOR SERVICES OF FIRMS/INDIVIDUALS SPECIALISING IN DIGITAL MARKETING PROMOTION & PR SOLUTIONS".
5. CDC Pakistan reserves the right to reject any or all bids and to annul the bidding process at any time.

SECTION-II

SCOPE OF WORKS

I. INTRODUCTION

CDC recently launched its Fintech portal related to Mutual Fund where investors can explore and invest in Mutual Funds completely online.

- **Background**

Emlaak Financials (www.emlaakfinancials.com) is the first of its kind platform in the local Asset Management Industry that offers a one stop shop for digitally on-boarding & investing in various mutual funds offered by different Asset Management Companies.

- **Category landscape**

Digital distribution for the mutual fund industry

- **Challenges, key issues & competitive context**

Emlaak Financials has been launched at a time when companies are rapidly shifting their focus towards going digital and offering online services to their investors. Hence, the challenge for Emlaak is to make its mark in the investment community at a time when most of the major AMCs are offering online account opening (for at-least simplified accounts) & transaction services. The edge that Emlaak offers is comprehensive Industry analytics and tools such as Fund Comparison and Return calculators that allow the investors to compare funds across multiple AMCs for a more informed investment decision. Since Emlaak is a digital distribution platform, another challenge it faces is lack of interest by member AMCs in promoting the platform, as they apprehend facing competition on the platform from other member AMCs. The challenge lies in promoting the platform as financial super market offering helpful analytics and seamless digital services which will attract investors and promote the savings culture in the local arena and winning the confidence of member AMCs by proving that it will serve to supplement their unitholder base while establishing a platform for healthy competition in the Mutual Fund industry.

II. SCOPE OF WORK

For this new digital platform, CDC intends to acquire services of a Marketing Consultant/Strategist (Individual or firm) for the following areas:

- Strategy Formulation with deliverables
- Advocacy
- Two (2) years Engagement Plan

III. DELIVERABLES

- Complete strategic formulation with deliverables including preparing a comprehensive Pan-Industry Digital Marketing & Promotional Plan.
- Comprehensive Execution plan in detail with timelines and targets.
- Comprehensive PR plan with timelines.
- Complete financials of all the identified areas in the scope.

SECTION-III

INSTRUCTIONS TO BIDDERS/ GENERAL TERMS AND CONDITIONS

GENERAL TERMS AND CONDITIONS

I. GENERAL:

- a) Only firms/individuals registered with relevant tax authorities and having experience of PR & Marketing.
- b) Interested PR & Marketing firms/individuals will submit their sealed bids comprising single package containing two separate documents. Each document shall contain separately the "FINANCIAL" and "TECHNICAL" proposal which will be clearly mentioned in bold and legible letters on respective document to avoid any confusion.
- c) All entries in the tender are to be made in English language.
- d) The rate should be written in the Bid Form (**Annex A**) in figures; whereas, the total offered price should be written in figures as well as in words. In case of any mistake in the totaling, the quoted unit rate will be treated as final.
- e) Interested Parties should not have faced any criminal charges, proceedings or cases.

II. ELIGIBILITY CRITERIA:

- a) The bidder must be Pakistan based Firm and registered with Income Tax and Sales Tax Authorities and on the Active Taxpayers list.
- b) No bidders shall have the right to make any objection, excuse or claim about correctness and sufficiency of this tender by the CDC.
- c) **COST OF TENDERING:** Bidders shall have no claim for reimbursement of any expenses of any kind whatsoever incurred in connection with the preparation and submission of their tenders.
- d) **INCOMPLETE TENDER:** Incomplete or partially submitted bid shall be decaled non-responsive.
- e) **SUBMISSION OF TENDER:** The Bids/ Proposals can be delivered in person or by email or through courier service at the following address:
 - a. **Muhammad Taha Tungekar Deputy Manager – Marketing & PD**
CDC Office, Central Depository Company of Pakistan Limited, CDC House, Block B,
S.M.C.H.S., Shahrah-e-Faisal, Karachi
 - b. **Email:** taha_tungekar@cdcpak.com
- f) The bids must reach on or before the time and date given in the notice of tender, including ones sent through courier.

III. TECHNICAL PROPOSAL:

- The Technical Proposal should contain minimum of following documents:
 - A covering letter addressed to the Head of Marketing & Product Development, categorically confirming that the agency fully meet the aforementioned Eligibility Criteria.
- Copy of the agency's certificate of incorporation (for firms).
- Tax Registration Certificates
- Detailed presentation on the Digital Marketing & PR strategy
- Complete strategic formulation with deliverables including preparing a comprehensive Pan-Industry Digital Marketing & Promotional Plan.
- Comprehensive Execution plan in detail with timelines and targets.
- Comprehensive PR plan with timelines.
- Complete financials of all the identified areas in the scope.
- Work Plan- Concept and timeliness.

IV. FINANCIAL PROPOSAL:

- The Financial Proposal must be filled in on the format at **(Annex-A)** in Pak Rupees and printed on the letterhead of the bidder.
- All Payments will be made in Pakistani Rupees.

V. AWARD OF CONTRACT:

- The contract shall be awarded to the firm/individual after CDC will complete its evaluation.
- Once CDC has arrived at the decision, a written Letter of Award to the successful bidder (s) will be issued which shall also mention the accepted contract price. Thereafter, the successful bidder (s) will be required to furnish a formal Contract agreement duly signed on a judicial stamp paper of appropriate value to CDC within seven working days from the award of Tender. In case of failure of the bidder to do so, the bid security will be forfeited.

FINANCIAL BID FORM
(To be printed on Letterhead of the Firm)

Financial Proposal
BID FORM

- a) **Name & Address of Bidder:** _____
Telephone: _____
Fax: _____
Email: _____
Sales Tax No. _____
National Tax No. _____

- b) We are ready for Provision of services given in the scope of services for an accumulated fee in Pakistan Rs..... inclusive of Sales Tax in words..... as per details given hereunder:

- c) Details of (Costing Breakup) in Grid sections for Strategy Formulation, Advocacy, or any other costing all should be in breakup section wise format.