



SECURITIES AND EXCHANGE COMMISSION OF PAKISTAN

T# 28/13-14

Invitation to Bid

The Securities and Exchange Commission of Pakistan (SECP) invites sealed bids from Advertising & Media companies registered with sales tax department and having national tax number (NTN) based in Pakistan for:

“BRANDING & PRODUCT DEVELOPMENT SERVICES FOR INVESTOR EDUCATION PROGRAM”

The relevant details plus terms and conditions may be obtained from the undersigned personally or by visiting the SECP website: www.secp.gov.pk/Procurement.asp

Clarification if any on the technical requirement may also be obtained by sending an email to ubaidullah.khalid@secp.gov.pk .

Sealed bid with 5% earnest of the maximum total quoted cost of the required services, must reach the undersigned through courier or may be dropped in the tender box on the ground floor of the NICL Building. The tenders must be received on **June 25, 2014, by 1500 Hrs** and will be opened on the same day at 1530 Hrs

M. Ubaidullah Khalid – Assistant Director (Admin)
4th Floor, NICL Building, 63 Jinnah Avenue, Islamabad
Tel: 9207091-4 Ext 107

Terms and Conditions for Bids and Bidders

1. **Tender Identification Number:** **TENDER # 28/13-14**
2. Bids are invited for “**BRANDING & PRODUCT DEVELOPMENT SERVICES FOR INVESTOR EDUCATION PROGRAM**” through **SINGLE STAGE ONE ENVELOP METHOD**
3. **The Procurement Agency is:**

Securities and Exchange Commission of Pakistan
4th Floor, NICL Building, 63 Jinnah Avenue, Blue Area,
Islamabad.
4. Relevant details plus terms and conditions of the tender may be obtained from the undersigned personally or by visiting the SECP website: www.secp.gov.pk/Procurement.asp
5. Clarification if any on the technical requirement may also be obtained by sending an email to ubaidullah.khalid@secp.gov.pk.
6. Bidders should quote for both Program Branding and Product Development as provided in the scope of work;
7. The SECP is not bound to accept the lowest bid and reserves the right to accept full or partial supplies offered and bidders should supply the same at the rates finalized.
8. The bid validity period shall be at least 60 days.
9. The amount of the bid and earnest money shall be in Pak rupees. Each bid should be accompanied by earnest money (refundable) for an amount equal to 5% of the total quoted price (inclusive GST, if applicable) in shape of either pay order, demand draft valid for not less than 6 months in favor of **Securities and Exchange Commission of Pakistan, 4th Floor, NICL Building, 63 Jinnah Avenue, Blue Area, Islamabad**. The tenders not accompanied by earnest money or with less amount of earnest money will not be entertained.
10. If the bid is withdrawn before the expiry of its validity or the supply/services are not made/provided within due date, the earnest money will be forfeited in favor of the SECP, Islamabad.
11. It is of utmost importance that bids should be submitted very carefully and the instructions set forth above, scrupulously complied with, failing which the offer will be ignored.
12. The language of the bid is English and alternative bids shall not be considered.
13. Amendments or alterations/cutting etc., in the bids must be attested in full by the person who has signed the bids
14. The prices quoted shall correspond to 100% of the requirements specified. The prices quoted by the bidder shall not be adjustable. Changes or revisions in rates after the opening of the bids will not be entertained and may disqualify the original offer.

15. The rates must be quoted strictly in accordance with our documents and Annex(s). In the event of non-acceptance of offer no intimation will be given to the individual bidder.
16. Discounts (if any) offered by the bidder shall be part of the bid.
17. The prospective bidders should have proven track record of similar nature of activities and magnitude. Preference would be given to bidders having experience of developing design and products for financial services including capital market or insurance.
18. The interested bidders must have regular place of business, telephone numbers and email address and must provide proof of their existence in the particular business, for not less than 2 years and proof of company as legal entity.
19. The proof of company's existence as a legal entity and an affidavit that the company is not blacklisted by any organization must be presented with the bid.
20. A copy of authorized agency/partnership/dealership/distributorship certificate from their principals is to be submitted with the bid, in case of any such claim.
21. The bidders do not have the option of submitting their bids electronically. Telegraphic and conditional bids will not be accepted. Unsealed bids will not be entertained.
22. The bidders will be required to submit a sample plan for SECP Investor Education Program.
23. Detail of applicable taxes and whether included or not in the quoted price and breakup of quoted price shall be clearly mentioned.
24. In case applicable taxes have neither been included in the quoted price nor mentioned whether quoted amount is inclusive or exclusive of such taxes, then quoted amount will be considered inclusive of all taxes and selected service provider will have to provide the required services, if selected and declared as best evaluated bidder.
25. The place of destination is: **Securities and Exchange Commission of Pakistan**, 4th Floor, NICL Building, 63 Jinnah Avenue, Blue Area, Islamabad.
26. The envelopes shall bear the following additional identification marks:

Bid for: **“BRANDING & PRODUCT DEVELOPMENT SERVICES
FOR INVESTOR EDUCATION PROGRAM”**

Firm Name: XYZ Firm
Attention: Assistant Director, Admin, 4th Floor
NICL Building, 63 Jinnah Avenue
Blue Area, Islamabad

27. The deadline for the submission of bids is:

Date: June 25, 2014
Time: 1500 Hrs

28. The bid opening shall take place at:

Securities and Exchange Commission of Pakistan
4th Floor, NICL Building, 63 Jinnah Avenue, Blue Area,
Islamabad
Date: June 25, 2014
Time: 1530 Hrs

29. A statement “**Not to be opened before 1530 Hrs on June 25, 2014**” shall be clearly mentioned on the top of the sealed bid.
30. The bids received after the due date and time will not be entertained. SECP reserves the right to reject and cancel all received bids at any time of the bidding process.
31. The earnest money of successful bidder will be retained and that of other bidders will be returned.
32. Successful bidder will be required to sign a non-discourse agreement in respect of the confidentiality of data and information of any sort available to the company during performance of services.
33. Performance Guarantee equal to 10% of Purchase Order / contract value, in the shape of demand draft or pay order in favor of SECP will be required by the successful supplier/firm. Moreover, on deposit of Performance Guarantee with SECP, earnest money of the successful bidder will be returned. Performance Guarantee will be released after delivery of identified product, materials and services.
34. The successful bidder will be required to make delivery in following two stages:

Stages	Description	Time Lines
I	a) Submission of Program Branding - brand identity (incl logo, theme, slogans, taglines for each market segment and matching product line) b) Submission of comprehensive digital and print brand guidelines	Within 45 days from the date of contract
II	a) Product Development of Capital Market, Mutual Funds and Insurance Sectors b) Supply of Print relevant print jobs	Within 90 days from the date of contract (could be extendable to 30 days on mutual consent).

35. In case successful bidder fails to supply/install and activate required equipment/services in given time, then a penalty of 1% of the performance guarantee per week will be imposed.
36. If the successful bidder fails to maintain the specifications (quality/quantity) of the equipment/supplies then their performance guarantee will be forfeited in favor of the Commission and contract/purchase order may be terminated.
37. The Bidder should be a Company registered with the Commission for providing the required services.
38. The Bidder should be a profit making Company in the last Financial Year.(2012-2013)

39. The Bidder should not be currently blacklisted by any Government / Government agency/ Bank / institution in Pakistan or abroad. The bidder should provide declaration to this effect on their company's letterhead.
40. The SECP reserves the right to relax any condition of the bidding document as per its requirement. Moreover, SECP reserves the right to amend/change/revise the Scope of Work, if deemed necessary. The successful bidder shall have to provide the services accordingly.
41. The right to accept, reject and cancel any offer without assigning any reason is hereby reserved. The SECP's decision will be final and binding in all matters relating to this tender.
42. The bidder shall furnish relevant documents supporting the above eligibility / qualification criteria along with the bid. SECP reserves the right to verify / evaluate the claims made by the bidder independently.

Documents Checklist	Yes/No
Certificate of incorporation - SECP	
Certificate of NTN	
Audited copies of financial statements – 2012-13	
Bidder's profile	
Earnest money	
Proof of executing 5 similar projects	
Affidavit	

Note:

- **The attachment details are as under**

1. Scope of Work

Annex "A"

2. Evaluation Criteria

Annex "B"

- **If the above terms and conditions are acceptable then bids must be submitted well in time and according to the requirements.**

SCOPE OF WORK**BRANDING & PRODUCTS DEVELOPMENT SERVICES – INVESTOR EDUCATION PROGRAM****IEP Objective**

Basic knowledge and understanding of financial markets and products is critical, in particular for general public, before making any investment or long-term financial contract decision. Apart from this one should also be fully aware of rights and obligations of both the parties – user and provider of services – at the time of entering into a financial contract. Lack of financial literacy and capability makes general public vulnerable to fraudulent activities and poor investment decisions.

The Securities and Exchange Commission of Pakistan (SECP) while recognizing the importance of investor education has initiated an Investor Education Program (IEP) that will impart knowledge about financial markets and products to different segments of the society.

Main theme of the program will be financial planning and budgeting, market setup and operations, product features and risks, rights and obligations of user and providers of financial products, and dispute resolution. It is expected that IEP would help the investors to take prudent measures before entering into a contractual agreement with a financial services provider, educate investors on strategies to mitigate risks associated with various investment products, engender investor confidence, and lead to an effective investor protection regime.

Under the program education would be imparted through digital means – web portal, SMS and social media – and physical interaction via seminars and investor days. Web portal is envisioned to play a pivotal role in the overall IEP as it would act as a single point learning resource for existing and potential users of financial products offered in capital market, mutual fund, pension fund and insurance industry.

Given the diversified target market consisting of youth, housewives, businessmen, professionals, traders, salaried persons, etc. and wide range of financial products; it is critical, for the success of the program, to communicate with the target audience in a language and manner that is most convenient for them and also easy to register and recall.

The program branding along with design and message is envisioned to play a pivotal role in the overall success of IEP. The material developed for existing and potential consumers of financial products offered by the capital market, mutual fund and insurance sectors should be attractive and engaging. Apart from these sectors, various SECP services like SMS, Web portal and Service Desk for complaints and queries would be highlighted through specially designed material. Write up in hard and soft form on various products, markets and topics would be provided by the SECP to the successful bidder.

Target Segment:

This program mainly focused on the diversified strata of youth, housewives, businessmen, professionals, traders, salaried persons and other similar segments.

Requirements:**1. (A) Program Branding**

- a. Design program brand identity including logo, theme, slogans, and taglines for each market segment and matching product line.

- b. Comprehensive digital and print brand guidelines which should cover all possible print material (booklets, flyers, posters, envelopes, standees, backdrops etc.), giveaways and digital means (like web portal, web banner, and social media. Care should be taken in appropriately and separately covering the 3 identified sectors viz. Capital Market, Mutual Funds and Insurance Sectors, and financial planning.
- c. Medium: English and Urdu

(B) Product Design and Development (each market)

The successful bidder will be required to design & develop:

- a) Tags lines for each sector and their relevant products, financial planning.
- b) 100 SMS messages per sector covering various products (maximum 160 characters)
- c) The content development (in respect of Booklets/ Guide Series, Flyers, Posters, Infographics, Standees, Backdrops and Digital Means) should be Eye Catching & easy to understand with appropriate illustration in shape of graphs, photos, diagrams, etc.
- d) Giveaways such as product branded Spiral Notebook(8"x6") 100 pages with 3 separators (with printing of info on IEP 3 sectors) and Pens (with printing).

2. Print Job

Deliverable	Specifications	Options	Quantity Bands
Booklet/ Guide Series: Investor Guides (separately for Capital Market, Mutual Funds, Pension Fund, Insurance Sector and Financial Planning) The bidder may propose either separate booklets OR propose series of Guides (with respect to Basic Level, Intermediate Level and Advanced Level)	Size: 6" x 8" 135gm Matt paper Pages: 16- 20	Quote separately for 2 colours and 4 colours printing	Quote separately for: a) 5,000 sets b) 10,000 sets c) 15,000 sets d) 20,000 sets
Flyers (single page) (bidder should keep in mind that the single page will be mainly used for mailing and distribution during seminars. These will have information about various sectors, SMS service, Web Portal Address & Service Desk contacts.	Envelop size Single page double side 135gm Matt paper	Quote separately for 2 colours and 4 colours printing	Quote separately for: a) 50,000 to 100,000 b) 100,000 to 250,000 c) Above 250,000
Flyers (multi-fold) The bidder may propose with respect to Basic Level,	Envelop size Multifold (all side printing) 135gm Matt paper	Quote separately for 2 colours and 4 colours printing	Quote separately for: a) 50,000 to 100,000 b) 100,000 to 250,000

Intermediate Level and Advanced Level (i.e. 3 to 4 different designs with respect to target segments for each 3 sectors and financial planning)			c) Above 250,000
Standeers – English & Urdu	Rolling Standard Standees with aluminum base		Quote separately for: a) upto 20 nos b) 20- 50 nos c) 50- 100 nos
Posters – English & Urdu	Standard poster size 24”x36” 135 gram matt paper	Quote separately for 2 colours and 4 colours printing	Quote separately for: a) Upto 1000 b) Upto 2000 c) Upto 5000
Envelopes small (white with branding)	Size: Small Standard for mailing flyers		Quote separately for: a) Upto 300,000 b) Upto 500,000 c) Upto 1,000,000
Envelopes Large (white with branding)	Size: A4 Standard		1000 nos.
Back drop Screen	Size: for class room	a) Small for class rooms (50-100 audience) b) Large for Auditorium (300 to 500 audience)	10 each
Giveaways	a) Pens (with printing) b) Notebooks	(please submit 3 different samples with prices)	10,000 nos Pen 2000 Notebooks

Evaluation Criteria:

Technical Evaluation	60%
Financial Evaluation	40%
Total	100%

Technical EVALUATION CRITERIA	Total Marks	Marks Obtained
Marks for technical evaluation =	60	0
Marks towards final Technical Evaluation =	60	0
Solution Capacity	30	
Offered proposal meet requisite features & specifications	20	
Research based proposal	10	
Supplier Capacity	30	
experience of branding or rebranding activities.	10	
Profile of Key executives	5	
experience of branding & developing campaigns for Financial Institutions	10	
Bidder holds an International Certification	5	
Total Points	60	

Marks for Financial Evaluation	40
Offered Price	30
Net worth	10