

ANNEXURE: A

REFERENCE: RFP 25/2025

BUSINESS REQUIREMENTS SPECIFICATION (BRS)

DESCRIPTION:

APPOINTMENT OF A SERVICE PROVIDER FOR
MARKETING AND ADVERTISING SERVICES FOR SARS
AND OTO

1. INTRODUCTION

SARS and the Office of the Tax Ombudsman (OTO) requires a full-service marketing and advertising agency which offers a wide range of services that cover the traditional, digital and creative marketing aspects of their businesses. The appointed marketing and advertising agency is further required to assist SARS with Marketing and Communication, Taxpayer and Trader Education and the OTO with the enhancement of their overarching strategies. In addition, the conceptualisation, development and implementation of comprehensive through-the-line marketing and tactical communication plans and products in support of the overall strategic objectives of SARS and the OTO. This encompasses all products, programmes and campaigns including brand building, positioning and advertising thereof.

Advertising, Taxpayer and Trader Education (*hereinafter Education*) and Marketing is an important aspect of SARS and OTO's marketing, education and communication strategy, and it is a platform which the organisation uses to reach out to taxpayers and traders about important tax matters.

2. SCOPE OF SERVICES

The Successful Bidder will be required to provide the following services to SARS Marketing and Communication, and the OTO in a diligent manner:

- Alignment and enhancement of the overarching marketing, education and communication strategies to ensure consistency, relevance, and impact across all campaign elements.
- Development of innovative (latest industry trends) creative strategies that complement and reinforce the primary marketing communication strategy. Development of tactical plans and creative targeted messages that align to the overarching marketing and education strategies.
- Development of tactical plans and targeted messaging aligned with specific campaign objectives to ensure strategic coherence and audience relevance.
- Collaboration with SARS, the OTO, and the appointed media placement service provider to develop and implement integrated through-the-line marketing communication plans.
- Identification of opportunities for improvement and innovation in communication, education and marketing for SARS and the OTO, with strategic recommendations on appropriate courses of action.
- Conceptualising, producing and sustaining effective through-the-line advertising communication, education and advertising in respect of all strategy development, creative production, account handling and account planning for marketing activities and campaigns of SARS and the OTO.

- Ensuring effective liaison for planning and implementation purposes with SARS and the OTO, media placement service provider and other related service providers.
- Providing design services including animation using different types of treatments for online use or presentations and the development of material using suitable applications.
- Provision of design services, including the development of animations for online platforms and presentations, as well as the creation of digital materials using appropriate software applications.
- Provision of audiovisual services, including the creation of videos for online platforms and other formats, videography, and comprehensive production support, covering scriptwriting, content editing, pre-production, production, and post-production.
- Providing effective account administration, cost control and reporting activities.
- Provision of advertising and market research services, including qualitative and quantitative research, as well as brand and campaign-specific surveys to inform strategic decision-making.
- Campaign management including but not limited to:
 - Submission of accurate material to media houses within the agreed timelines
 - Preparation of different types of reports as required by the client (see section reports for details)
 - Accurate management of campaign financials and reporting thereof; and
 - Attending weekly status meetings and recording them.
- Scriptwriting and content development for a range of purposes, including advertising, educational, promotional, and technical communication.
- Provision of art direction services for specific projects, ensuring visual coherence, creative alignment, and high-quality execution across all design elements.
- Provision of creative direction services for specific projects, ensuring alignment with overall overarching marketing, education and communication strategies.
- Development and production of podcasts and vodcasts, including concept creation, scripting, recording, editing, and distribution across relevant digital platforms.
- Development of content and materials for mainstream media, television, radio, online, social media, and mobile platforms, in accordance with the latest technology standards, as and when required.
- Transfer skills to SARS and OTO employees on the production of material fit for television including the development of a playbook.
- Transfer skills to SARS and OTO employees on scriptwriting for various purposes like a promotion, education video or any audio-visual productions.

2.1. Specific Requirements

2.1.1 Retainer Services

The Successful Bidder must be able to offer a full retainer service. The list below outlines key components of the retainer-services required, though it is not exhaustive.

The Successful Bidder will implement an always on approach of marketing and advertising to inform and educate taxpayers and traders about services on tax, customs and excise matters. SARS expects to receive priority regarding the fulfilling of requests and quick turnaround times regardless of the successful bidder's traffic.

The Successful Bidder will be expected to conceptualise, develop and implement comprehensive through-the-line marketing, communication and advertising strategic plans in support of the strategic objectives of all SARS products, divisions, programmes and campaigns including brand building and positioning. In addition, conduct market research component to ensure that the campaigns are aligned with current taxpayer consumer trends, audience preferences, and competitive positioning particularly within the South African context for 2025 and beyond. The research will be instrumental in shaping an overarching marketing, educational and advertising campaign that is both impactful and data driven. Specifically, with insights on:

- Target audience segmentation and behavioural patterns.
- Market landscape analysis, international benchmarking and positioning.
- Media consumption habits and creative ideas relevant to SARS / OTO demographic.
- Any relevant AI-driven or digital marketing trends.

The Successful Bidder should report on the performance of the deliverables by utilising metrics and reports.

2.1.2 Retainer Resources

The following key personnel must be assigned to SARS (including their number of years' experience):

- Strategist Director ("SD") with a minimum of 10 years of proven experience as a campaign strategist in at least one of the following industries: marketing, communication, public relations and advertising with 5 years of the experience being in the financial sector.
- Senior Client Service Person ("SCSP") (to be referred as a Key Account Manager) with a minimum of 10 years of proven experience as a Senior Client Service

Person in at least one of the following industries: marketing, communication, public relations and advertising with 5 years of experience being in the financial sector. The SCSP must be a different person from the SD above.

- Client Service Support Person with a minimum of 5 years of proven experience in at least one of the following industries: marketing, communication, public relations and advertising with 5 years of experience being in the financial sector.
- Traffic Manager with a minimum of 5 years of proven experience in at least one of the following industries: marketing, communication, public relations and advertising with 2 years of experience being in the financial sector.
- Senior Creative Person with a minimum of 8 years of proven experience in creativity with 4 years of experience being in the financial sector.
- Art Person with a minimum of 5 years of proven experience in design.
- Copy Writer with a minimum of 5 years of proven experience in copy writing.
- Researcher with a minimum of 10 years of proven experience in market research. and
- Graphic Designer with a minimum of 5 years of proven experience in graphic design.

Note:

- The retainer service will primarily apply to SARS, covering ongoing strategic, creative, and operational support as outlined in the scope of work. The Office of the Tax Ombud (OTO) will access the same resources on an ad hoc basis and will be billed per service rendered under a fee-for-service arrangement. For each engagement, SARS will issue a detailed brief to the appointed service provider.
- It is critical that the Bidder provide **ALL** the resources required.

2.2. SARS and OTO Requirements

2.2.1 Production services

Campaign execution / production

This is costed separately and not part of the retainer fee. This refers to all requests that have to be outsourced to other suppliers by the appointed bidder; for example, a studio for recording a radio advert and sourcing of voice over artists. This list is not exhaustive, and the following services should be made available as and when required:

- Radio Production.
- TV Production.
- Brand and campaign surveys.

- Art buying.
- Booking and handling fees for voice-overs / castings.
- Music rights / royalties.
- Model fees.
- TV and radio performers' fees.
- A transmission tool to send material to media houses.
- Conceptualisation and implementation of SARS and OTO specific events when required.
- Video or digital productions Photography.

2.2.2 Taxpayer and Trader education services

The Successful Bidder will be required to assist SARS Taxpayer and Trader Education in the educational campaigns as follows:

- Support the development of educational materials for the Financial and Fiscal Education programme, tailored to various life stages of a taxpayer, example, from childhood to deregistration as a taxpayer.
- Using SARS content, design multimedia – segment specific taxpayer branded toolkits, creating visually appealing layouts for lesson plans, worksheets, and classroom materials that align with the campaign's tone, audience, and objectives. Handle content structuring, organizing materials into user-friendly formats and developing engaging narratives to enhance learning. To boost classroom engagement, the Successful Bidder will incorporate interactive elements such as quizzes, videos, gamified activities, and templates like posters, flashcards, and slide decks.

2.2.3 Ad hoc resources for production services

In addition to the key personnel assigned for retainer services, there are additional ad hoc resources that may be required depending on specific production needs. These resources should be made available on an as-and-when needed basis. The list below is not exhaustive but includes the following roles:

- Strategy Planner with a minimum of 10 years of proven experience in at least one of the following industries: marketing, communication, public relations and advertising with 3 years of experience being in the financial sector.
- Production Manager with a minimum of 5 years of proven experience in production management.

- Animator with a minimum of 5 years of proven experience in the field (TV, Film, gaming, advertising, education and more.)
- Videographer with a minimum of 5 years of proven experience as a videographer.
- Branding Activation Specialist with a minimum of 5 years of proven experience in brand management and marketing.

Note:

- It is critical that the Bidder provide **ALL** the resources required.

2.3. Reporting requirements

Weekly reporting

- Weekly written status reports must be presented at the weekly agency status meetings which will be held virtually or at the SARS offices in Pretoria.
- Soft copies of the status report plus minutes of the status meeting must be sent to SARS within forty-eight (48) hours after each meeting.
- These meetings will be attended by representatives from SARS, the appointed media buying agency and the Successful Bidder.
- The Successful Bidder must be represented by the Senior Client Service Person as a minimum.

Monthly reporting

- A soft copy of a monthly report of all work performed during the month. This should include as a minimum final material for each campaign running must be submitted in PowerPoint format by the end of each month. This report needs to include performance metrics of each campaign element rolled during the particular month.

Campaign reporting

- A campaign report in PowerPoint format detailing the strategy, all final creative work, campaign performance metrics, final budget and recommendations must be presented within fourteen (14) days after the conclusion of a campaign. Two (2) printed copies plus a soft copy must be provided to SARS and the OTO respectively. This particular report may also be referred to as a close-out report.

End of contract period: Close-out report

- At the end of the three-year contract, the service provider is required to compile an analysis report of the services provided, including comprehensive recommendations on how SARS and the OTO can improve their campaigns.

2.4. Post campaign effectiveness tracking studies

The Successful Bidder will be required to:

- Develop research documents (e.g. questionnaires)
- Design and implement qualitative research
- Design and implement quantitative research
- Interpret and report research results and
- Submit a draft and final report of the research study.

2.5. Dedicated Training

The Successful Bidder will be required to avail:

- A qualified and experienced television producer to transfer skills to SARS and OTO employees on the production of material fit for television including the development of a playbook.
- A qualified and experienced scriptwriter to transfer skills to SARS and OTO employees on scriptwriting for various purposes like a promotion, education video or any audio-visual productions.

Six (6) months after the commencement of the contract, the service provider must be readily available to deliver the required training. The designated resources must be committed to delivering services continuously over a twelve (12) month period.

2.6. Contractual Skills Transfer

Bidders must commit to a post-campaign implementation review for each campaign. The Bidder will be required to transfer skills to the SARS Communication and the OTO teams based on a mutually agreed programme of activity over the period of the contract.

3. REQUIREMENTS FROM THE BIDDERS / BIDDERS RESPONSE

The Bidders should provide in their response a comprehensive company profile detailing:

3.1. Company Profile

- Company profile and clearly indicate-
 - Company's years of experience in providing marketing and communication services; and
 - Infrastructure to be able to produce work of the same quality standard as an on-going business even during a crisis (e.g. Business interruption (backup) and loadshedding) and to be able communicate with SARS and OTO (by having e.g. laptops, tablets, cell phones and systems in place to connect virtually e.g. zoom and

MS teams) to render the services.

- The bidder must demonstrate the ability to provide a full spectrum of in-house services tailored to marketing and advertising, including both traditional and technology-enhanced capabilities. These services should reflect a strategic, creative, and technically proficient approach to content creation and campaign execution. In addition, the bidder must demonstrate forward-thinking with the use of AI technologies to deliver innovative, scalable, and impactful content across multiple platforms.

3.2. Resources

3.3.1 Retainer Resources

The bidder must provide a one (1) page Curriculum Vitae (CV) for each retainer resource as required under section 2.1.1. Each CV must be signed by both the individuals concerned and the authorised official of the bidder illustrating the following:

- Level of expertise (Designation/Title) of each resource recommended to SARS
- Years of experience in the required industry sectors and
- Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning to the level of a Diploma verified by SAQA) and provide certified copy. Date of certified copies should not be older than 6 months.

3.3.2 Ad hoc resources for production services

The bidder must provide a one (1) page Curriculum Vitae (CV) for each ad hoc resource as required under section 2.2.3. Each CV must be signed by both the individuals concerned and the authorised official of the bidder illustrating the following:

- Level of expertise (Designation/Title) of each resource recommended to SARS
- Years of experience in the required industry sectors and
- Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning to the level of a Diploma verified by SAQA) and provide certified copy. Date of certified copies should not be older than 6 months.

3.3.3 Dedicated Training Requirements

Bidder must provide the following resources:

i. Qualified and Experienced Producer:

The bidder must submit a portfolio of previous work demonstrating their ability to train staff with emphasis on the following:

- a. A structured skills transfer plan and outcomes.
- b. Use of AI-driven tools and omnichannel content production.
- c. Demonstrate access to studio and equipment.

ii. **Qualified and Experienced Scriptwriter:**

The bidder must submit a portfolio of previous work demonstrating their ability to train staff with emphasis on the following:

- a. Engaging and strategic scripts tailored to different audiences.
- b. Using a structured skills transfer plan and outcomes.
- c. Use of AI-driven tools and omnichannel content production.

3.3. Capability

Bidder must provide a schedule of its experience and proven track record over the past four (4) years with 3 clients and not more where they implemented these three (3) types of campaigns: digital, multimedia education and outreach. The information provided for each client must include:

- Client name;
- Description of a project / campaign;
- Contract period;
- Value of the project;
- Challenges and how they were resolved; and
- Value-added services.
- Showreel (Mp3 /PowerPoint video format) demonstration of creative execution through-the-line per campaign.

3.4. Testimonials

Bidders are required to submit testimonials (not older than 5 years) from **only** two (2) clients listed on 3 clients above where similar services were provided. Refer to Annexure B which must be completed by the Bidder's Clients. Each testimonial must include but not be limited to:

- Client name;
- Contact person, phone number, email address, company business address;
- A brief description of the full services rendered
- Value of the project;
- Quality of service;
- Quality of reports;
- Whether work was completed within budget or not

Notes:

- Annexure B may be copied to the client's company letterhead or authenticated with a company stamp. It is important to keep SARS format of questionnaire.
- SARS reserves the right to contact the clients for a reference check. It is important to ensure that the clients are contactable.

3.5. Understanding of the SARS and OTO Brand

Bidders are required to compile a one-page document demonstrating an understanding of SARS and OTO (in not more than 500 words on MS Word):

- An understanding of the SARS and OTO brand and their mandate, SARS higher purpose, tax types, target audiences, communication channels and corporate identity
- An understanding of challenges facing SARS and OTO brands and how these could be addressed.

3.6. Skills Transfer

Bidders must submit a skills transfer plan that demonstrates their approach to ensure skills and knowledge transfer to nominated SARS and OTO staff during post-campaign implementation reviews of each campaign. The skills transfer plan must contain the following minimum details:

- Skills transfer plan with outcomes or deliverables contemplated.
- Details of how the Successful Bidder will report to SARS and OTO on progress made; and
- Details of how the SARS and OTO Communication teams, who participate in the skills transfer program, will be assessed to determine their comprehension of skills transferred