Terms of Reference (ToR)
Prequalification of Communications Firms (Technical Requirements)

Ethiopian Securities Exchange (ESX)

Date: September 17, 2025

1. Background & Purpose

The Ethiopian Securities Exchange (ESX) is preparing to implement major public awareness and education initiatives to support the launch and growth of Ethiopia's capital market. To ensure professional, timely, and high-quality communications delivery, ESX requires the services of experienced communications firms with proven financial, technical, and organizational capacity.

This ToR sets out the technical, organizational, and compliance requirements for prequalification of firms to be invited to future requests for proposal (RFP) for communications and event support. The scope here is limited to capability verification, not creative concepts or pricing.

1.1 Purpose

Identify and prequalify communications firms that can provide reliable, large-scale communications and event support to ESX. Prequalified firms will be invited to participate in subsequent competitive RFPs.

2. Objectives of the Communications Engagement

- Design and implement a creative, compelling awareness campaign to educate the public on how to open an investment account (investor education).
- Manage communications and media outputs related to the roadshow and allied activities.
- Develop culturally relevant, locally resonant messages in multiple languages.
- Amplify ESX's visibility through on-the-ground activations.
- Build momentum around the capital-market ecosystem by curating community-driven narratives and clear calls-to-action.

3. Scope of Requirement (Capability Domains)

- Event communications support (branding, on-site capture, and post-event content packages).

- Content production (design, video/audio, and localization into multiple Ethiopian languages).

4. Expected Scope of Work

4.1 Messaging, Branding & Content Development
- Prepare public-awareness materials (brochures and one-pagers).
- Develop translated scripts and audio recordings for mobile-car announcements in local languages.

4.2 Mobile Caravan Activation Support
- Produce pre-recorded audio content for car-mounted speaker announcements in multiple local languages.
- Deliver visual branding of mobile vehicles (stickers, door panels, flags) in line with ESX brand assets, as needed.

4.3 On-Site Visuals & Experience Design
- Coordinate tent/signage branding for consistency across cities.
- Document events via high-quality photography and videography for ESX archives and future use (shot lists agreed in advance).

4.6 Post-Event Communications Support
- Produce edited highlight videos and curated photo sets for each stop.
- Prepare short-form content (reels, carousels) optimized for ESX digital channels.

4.7 Monitoring, Measurement & Reporting
Establish a measurement framework and baseline prior to launch; track and report media metrics and engagement outcomes per city and cumulatively. Minimum metrics include:

- Activation: estimated footfall/attendance, stakeholder mix, signups/expressions of interest, materials distributed.
- Production/Ops: on time delivery against schedule, rework cycles, SLA adherence (turnaround times).
- Reporting: city-level report within 7 business days of each activation; consolidated end-of-tour report within 10 business days, with insights and recommendations.

4.8. Live Streaming & Broadcast Support
- Plan and run live video for ESX events with multiple cameras and clear sound.

- Stream to agreed platforms (YouTube, Facebook, X, website) and monitor in real time to fix issues fast.
- Add on-screen graphics (titles/lower-thirds, countdowns) and live captions; support simultaneous interpretation if needed.
- Use backups (extra encoder, power, audio) and reliable internet (bonded fiber/4G/5G) with automatic failover.
- Moderate live comments and Q&A; save the full recording and deliver edited clips (VODs) on time.

5. Mandatory Technical & Organizational Requirements

A) Legal & Organizational Standing
- Valid business registration and renewed trade license.
- Tax clearance / TIN / VAT registration copies (current).
- Conflict of Interest declaration

B) Financial Position & Turnover
- Audited financial statements for the last five (5) fiscal years, signed by a licensed auditor.
- Summary table showing annual turnover for each of the last five (5) years and the average turnover.

C) Staffing & Delivery Capacity
- Organization chart.
- Key personnel CVs (max 2 pages each) for: Project/Account Director, Creative/Brand Lead, Communications Strategist/Media Lead, Audio-Visual Production Lead, Field Operations/Events Lead.
- Surge capacity plan describing how the firm scales for parallel regional activations.

D) Relevant Work History (with Lead-Time Evidence)
- Table of the last five (5) comparable assignments (past 5 years minimum), including for each: client; project title; scope/channels; geographic coverage; audience size/reach; lead time from award to go-live (calendar days) and total duration; team size/roles; deliverables; outcome indicators (earned media, digital reach, event attendance, stakeholder feedback); client focal contact (email & phone).

E) Testimonials & References

- Minimum of Three (3) recent written testimonials/reference letters on client letterhead, signed and dated, commenting on delivery quality, timeliness, issue management, and professionalism; include referee contacts for verification.

F) Multilingual & Localization Capability

- Evidence of content production in multiple Ethiopian languages in addition to Amharic (samples or links).

G) Quality, Data Protection, and Intellectual Property

- Quality assurance and review workflow, including content approvals and error-correction protocols.
- Intellectual Property: all work products created under any resulting contract shall be Work-for-Hire; ESX retains full IP ownership; contractor warrants rights to use all third-party elements and clears rights before delivery.

6. Service Levels & Key Performance Indicators (KPIs)

- Mobilization lead time: ability to commence within 5–10 business days of notice for standard activations (propose realistic bands by activation type).
- On-time delivery: ≥ 95% milestones met across comparable projects.
- Content quality: ≤ 1 major rework cycle per asset type post-brand approval.
- Event documentation: photo selects within 48 hours; rough-cut video within 5 business days; final edits within 10 business days (or propose equivalent).
- Reporting: post-event/flight report within 7 business days, with agreed metrics.

7. Deliverables

- Awareness materials (print-ready PDFs and press-quality assets).
- Audio scripts and multilingual recordings for caravan announcements.
- Event coverage packages per city (curated photo set + short highlight video + caption sheet).
- Monitoring & Evaluation: city-level performance reports with the metrics in Section 4.6; a consolidated dashboard and narrative M&E summary with media metrics, lessons learned, and recommendations.

8. Evaluation Method & Weights (Prequalification)

Minimum technical threshold to prequalify: 70/100.

- Financial position & turnover
- Staffing & delivery capacity

- Relevant work history & lead-time performance
- Testimonials & references
- Compliance & ethics

9. Submission Format (Technical Dossier Only)

Submit **only** the technical dossier (no prices/financial proposal). The submission must include:

a) Cover Letter (1 page)

Confirming the firm's eligibility and acceptance of the ToR. Include legal name, authorized signatory, and contact person (name, email, phone).

b) Technical Dossier

Organize the content **in the order of Section 5 (A–G)**:

- Legal & Organizational Standing
- Financial Position & Turnover
- Staffing & Delivery Capacity
- Relevant Work History (with lead-time evidence)
- Testimonials & References
- Multilingual & Localization Capability
- Quality, Data Protection & Intellectual Property
- Insurance, Safety & Ethics

Place supporting evidence in **clearly labeled appendices** (e.g., *Appendix B1 – Audited Accounts 2023*).

c) File Format

- **One (1) PDF** only, **searchable text** (not image scans).
- Include **bookmarks** for each main section (e.g., "A) Legal", "B) Financial", etc.).
- **Page limit:** maximum **40 pages** for the main dossier; appendices are **not** counted toward this limit.

d) File Naming

FirmName_ESX_Prequalification_Technical.pdf
(Example: BlueSkyMedia_ESX_Prequalification_Technical.pdf)

Note: Submissions that exceed the page limit, lack bookmarks, or include pricing may be deemed non-complaint.

10. Administrative Provisions

- Validity: submissions valid 30 days from deadline.
- Clarifications: via email to info@esx.et; responses may be shared with all participants.
- Site visits/Interviews: ESX may request presentations and client referee checks.
- No commitment: prequalification does not oblige ESX to award future work.

11. Submission Requirements

All proposals must be submitted no later than **5:00 PM East Africa Time on Tuesday, October 1, 2025.** Late submissions will not be considered.

Submission Options:

Interested Firms may submit their documents either electronically or through physical delivery, as outlined below:

Electronic Submission

- Submission Email: info@esx.et

- Email Subject Line:
  "Proposal for Communications Firm Engagement – Capital Market Awareness Tour"
  (Please ensure this subject line is used to facilitate proper processing.)

- Proposal Format:

    - Technical proposals must be submitted as separate PDF documents.

Please ensure that submission meets the deadline requirements. Only complete proposals received by the deadline will be considered.

For submission and further inquiries, please contact:

📞 **+251 95 212 0031**