



## SOUTH AFRICAN TOURISM

### PART C: TENDER EVALUATION PROCESS- SAT TENDER 202/21 - BUSINESS EVENTS BRAND EQUITY STUDY

Summary of the Evaluation Phases (table below):

**Table 1: Evaluation Summary**

Phase 1 Administrative and Mandatory bid evaluation	Phase 2 Desktop Technical Functional Evaluation	Phase 3 Price and Preference (B-BBEE) Evaluation
Service providers' responses will be evaluated based on compliance with the listed administrative and mandatory bid requirements.	Service provider (s) are required to achieve a minimum threshold of 75% to proceed to Phase 3.  The Tender/Evaluation Matrix Cross Reference: Service providers should reference the criteria to the portfolio of evidence in the bid proposal.	Service provider(s) who achieved a minimum threshold of 75% on phase 2 will be evaluated on 80/20.

#### Phase 1: Administrative and Mandatory bid evaluation

All documents must be completed, each page initialized and signed by the duly authorised representative of the prospective service provider (s). During this phase, service provider s' responses will be evaluated based on compliance with the listed administrative and mandatory bid evaluation.

**Table 2: Phase 1: Administrative and Mandatory bid evaluation**

Documents that must be submitted	YES/NO	Non-submission may result in disqualification?
Confirmation of valid Tax Status		Written confirmation that SARS may, on an ongoing basis during the tenure of the contract, disclose the bidder's tax compliance status. SARS Tax Compliance System Pin ( <i>South African Companies only</i> )  CSD report confirming the bidder's Tax Compliant status.
B - BBEE Certificate 1		B - BBEE Certificate ( <i>South African Companies</i> ) or, for companies that have less than R10 million turnover, a sworn affidavit or is required. A copy of the template for this affidavit is available on the Department of Trade and Industry website  <a href="https://www.thedti.gov.za/gazette/Affidavit_EME.pdf">https://www.thedti.gov.za/gazette/Affidavit_EME.pdf</a> ( <i>Failure to submit sworn affidavit will result in non-compliant on a preference points system</i> ) ( <i>South African Companies only</i> )
Annexure A-Invitation (SBD 1)		Complete, initialize each page, and sign the Standard Bidding Document (SBD) where applicable.
Annexure B-Registration on Central Supplier Database		All agencies, including proposed partner/subcontractor agencies, must be registered as a service provider on National Treasury's Central Supplier Database (CSD). If you are not registered, proceed

(CSD)		to complete the registration of your company before submitting your proposal. Visit <a href="https://secure.csd.gov.za/">https://secure.csd.gov.za/</a> to obtain your vendor number. Submit proof of registration. <b><u>(South African Companies only)</u></b>
Annexure D-Preferential Procurement SBD 6.1		Complete, initialize each page, and sign the (SBD) where applicable.
Annexure E-Declaration of Interest - SBD 4)		Complete, initialize each page, and sign the SBD where applicable.
Annexure F-Declaration of Bidder's Past Supply Chain Management Practices - SBD 8		Complete, initialize each page, and sign the SBD where applicable.
Annexure G-Certificate of Independent Bid Determination - SBD 9		Complete, initialize each page, and sign the SBD where applicable.

### Phase 2: Desktop Technical Evaluation = Weighting out of 100 basis points

All service providers are required to respond to the technical evaluation criteria scorecard and provide information/portfolio of evidence that they unconditionally hold the available capacity, ability, experience, and qualified staff to provide the requisite business requirements to South African Tourism under this tender.

Service providers will be required to achieve a minimum threshold of 75% to proceed to Phase 3 for Price and BBBEE level of contribution evaluations.

**Table 3: Phase 2: Desktop Technical Functional Evaluation**

in	Weight
<p>Criterion 1:</p> <ul style="list-style-type: none"> <li>Credentials and Experience relevant to the scope of work under this RFP, service provider should show (brand studies, tracker studies, and size (multi-country studies); understanding of the competitive bidding process within the Conferencing and Events sector will be an advantage)</li> <li>The service provider is required to provide three (3) contactable client references where its services can be verified. References should be presented in the form of a written letter on official letterhead from clients with similar services stating clearly what work was done for them. <ul style="list-style-type: none"> <li>Service providers should not be older than four (4) years from the closing date of this RFP. No appointment letters from clients will be accepted as reference letters.</li> </ul> </li> </ul>	10
<p>Criterion 2:</p> <ul style="list-style-type: none"> <li>Research Design: Comprehensive application of the research design and demonstrate understanding of the business goal/problem to include research methodology, data collection, and sampling while motivating why the proposed research design is the best in answering the business problem</li> <li>Service provider should demonstrate that they have considered possible limitations to the study and advise how to mitigate possible limitations</li> <li>Show examples of what the report emanating from the study will look like (using dummy data)</li> </ul>	40

<p>Criterion 3:</p> <ul style="list-style-type: none"> <li>• Infrastructure and capacity</li> <li>• Provide evidence of a field force and fielding tools</li> <li>• Demonstrate data processing capabilities including software that will be used to process data</li> <li>• Demonstrate methods of how data quality will be insured (Assessment compliance and methods, quality measures that are applied by the entity to ensure that the data is of sound quality, including local or global data security and data quality compliance documents)</li> <li>• Provide details on what applications/tools will be used. Show how efficient and technologically advanced the tools, methods employed in the project are. Show how the tools /methods are cost-effective and/or robust, and/or lead to a quicker turnaround time compared to traditional tools and methods</li> </ul>	35
<p>Criterion 4:</p> <ul style="list-style-type: none"> <li>• Proposed project team that will be assigned to the project and their experience</li> </ul> <ol style="list-style-type: none"> <li>1. Advisory person(s) should have: <ul style="list-style-type: none"> <li>• 20+ years research experience (5 points)</li> <li>• 15 - 19 years research experience (4 points)</li> <li>• 11 - 14 years research experience (3 points)</li> <li>• 5 to 10 years research experience (2 points)</li> <li>• Less than 4 years research experience (1 point)</li> <li>• No CV in line with the above requirements (0 Points)</li> </ul> </li> <li>2. Research Project leader should have: <ul style="list-style-type: none"> <li>• 10 years research experience (5 points)</li> <li>• 7 - 9 years research experience (4 points)</li> <li>• 5 - 6 years research experience (3 points)</li> <li>• 3 - 4 years experience (2 points)</li> <li>• 1- 2 years (1 point)</li> <li>• Less a year (0 Points)</li> </ul> </li> <li>3. Support team members should have an average of: <ul style="list-style-type: none"> <li>• 15+ years research experience (5 points)</li> <li>• 11 - 14 years research experience (4 points)</li> <li>• 8 - 10 years research experience (3 points)</li> <li>• 5 - 7 years research experience (2 points)</li> <li>• Less than 5 years research experience (1 point)</li> <li>• No CV in line with the above requirements (0 Points)</li> </ul> </li> <li>4. Demonstrate that you have a market support team for 16 -18 markets. The market support team should be a market expert and should have sound local market knowledge with at least 5 years of experience. <ul style="list-style-type: none"> <li>• Support in 16 - 18 markets (5 points)</li> <li>• Support in 13 - 15 markets (4 points)</li> <li>• Support in 10 - 12 markets (3 points)</li> <li>• Support in 7 - 9 markets (2 points)</li> <li>• Support in less than 9 markets (1 point)</li> <li>• No experience in line with the above requirements (0 Points)</li> </ul> </li> </ol>	10
<p>Criterion 5:</p> <ul style="list-style-type: none"> <li>• A detailed project implementation plan with timelines from inception to completion of the project; (with deliverables and dependencies)</li> </ul>	5
TOTAL	100

If required, they will be at a high level where criteria will be identified that the bid evaluation team might be interested in looking more closely at. The bid evaluation committee will have the opportunity to ask questions and make notes of what they consider to be gaps in the proposals compared with how well the business requirements are satisfied.

- Bids proposals will be evaluated strictly according to the bid evaluation criteria stipulated in this section.
- Service providers must, as part of their bid documents, submit supportive documentation for all functional requirements as indicated in the Terms of Reference. The panel responsible for scoring the respective bids will evaluate and score all bids based on information presented in the bid proposals in line with the RFP.
- The score for functionality will be calculated in terms of the table below where each Bid Evaluation Committee (BEC) member will rate each individual criterion on the bid evaluation score sheet using the following value scale/matrix:

**Table 4: Technical Functional Evaluation Matrix**

Rating	Definition	Score
<b>Excellent</b>	<b>Exceeds</b> the requirement. Exceptional demonstration by the supplier of the relevant ability, understanding, experience, skills, resources, and quality measures required to provide the goods/services. Response identifies factors that will offer potential value, with supporting evidence.	<b>5</b>
<b>Good</b>	<b>Satisfies</b> the requirement with <b>minor additional benefits</b> . Above-average demonstration by the supplier of the relevant ability, understanding, experience, skills, resources, and quality measures required to provide the goods/services. Response identifies factors that will offer potential required services, with supporting evidence.	<b>4</b>
<b>Acceptable</b>	<b>Satisfies</b> the requirement. Demonstration by the supplier of the relevant ability, understanding, experience, skills, resource, and quality measures required to provide the goods/services, with supporting evidence.	<b>3</b>
<b>Minor Reservations</b>	Satisfies the requirement with <b>minor reservations</b> . Some minor reservations of the supplier's relevant ability, understanding, experience, skills, resource, and quality measures required to provide the goods/services, with little or no supporting evidence.	<b>2</b>
<b>Serious Reservations</b>	Satisfies the requirement with <b>major reservations</b> . Considerable reservations of the supplier's relevant ability, understanding, experience, skills, resource, and quality measures required to provide the goods/services, with little or no supporting evidence.	<b>1</b>
<b>Unacceptable</b>	<b>Does not meet the requirement</b> . Does not comply and/or insufficient information provided to demonstrate that the supplier has the ability, understanding, experience, skills, resource & quality measures required to provide the goods/services, with little or no supporting evidence.	<b>0</b>

**Phase 3: Price and BBBEE Evaluation (80+20) = 100 points**

Only service provider (s) who meets the minimum threshold of 75% during Phase 2 will be further evaluated for comparative price and BBBEE level of contribution.

The total points for price evaluation (out of 80) and the total points for B-BBEE evaluation (out of 20) will be consolidated. The service provider who scores the highest points for comparative pricing and B-BBEE status level of contributor after the consolidation of points will normally be considered as the preferred service provider who South African Tourism will enter into further negotiations.

Upon the successful negotiation and signing of a contract and services level agreement with the preferred service provider, all other service providers will be considered as unsuccessful.

In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a service provider for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

Upon the successful negotiation and signing of a contract and services level agreement with the preferred service provider, all other service providers will be considered as unsuccessful.

END