



SOUTH AFRICAN TOURISM

PART C: TENDER EVALUATION PROCESS- SAT TENDER 200/22 ROUTE TO MARKET

Summary of the Evaluation Phases (table below):

Table 1: Evaluation Summary

Phase 1 Administrative and Mandatory bid requirements	Phase 2 Desktop Functional Technical Evaluation	Phase 3 Price and 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. – it is of vital importance that systematic scoring can be carried out.	The tender will be evaluated on either the 80/20 or 90/10 preference point system. Once a tender is received, the lowest acceptable tender will be used to determine the preference point system to be used for the evaluation. Where the lowest acceptable tender is below R50 million, the 80/20 preference point system must be used. If the lowest acceptable tender is above R50 million, the 90/10 preference point system must be used.

Phase 1: Administrative and Mandatory bid requirements

All documents must be completed 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 requirements.

Table 2: Phase 1 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 (South African Companies) or an affidavit is required for companies with less than R10 million turnover. A copy of the template for this affidavit is available on the Department of Trade and Industry website https://www.thedti.gov.za/gazette/Affidavit_EME.pdf <i>(Failure to submit affidavit will result in non-compliant on a preference points system) (South African Companies only)</i>
Annexure A-Invitation (SBD 1)		Complete and sign the supplied pro forma document
Annexure B-Registration on Central Supplier Database (CSD)		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 to complete the registration of your company before submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Submit proof of registration. <i>(South African Companies only)</i>
Annexure D-Preferential Procurement SBD 6.1		Complete and sign the supplied pro forma document
Annexure E-Declaration of Interest - SBD 4)		Complete and sign the supplied pro forma document
Annexure F-Declaration of Bidder's Past Supply Chain Management Practices - SBD 8		Complete and sign the supplied pro forma document
Annexure G-Certificate of Independent Bid Determination - SBD 9		Complete and sign the supplied pro forma document

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 Evaluation

Evaluation Criteria	Weight
<p>Criteria 1: Bidders satisfactory delivery on previous Route to Market (Market entry)</p> <ul style="list-style-type: none"> The service provider is required to provide a minimum of three (3) contactable client references for work of a similar nature, rendering research services for market entry strategies, market landscaping analysis, market sizing strategies, and new product launch strategies that 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. <p>Each bidder must provide</p> <ul style="list-style-type: none"> Positive references - Testimonial must reflect delivery against objectives and KPIs and delivering full service Reference letters 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 <p>Reference letters will count towards scoring if they meet the quality standards listed above</p> <p>Scoring: As per Table 4: Functional Evaluation Matrix</p> <ul style="list-style-type: none"> 3 reference letters that meet the above requirements will be deemed ACCEPTABLE Less than 3 References that meet the criteria will be deemed UNACCEPTABLE No reference letters provided will be deemed UNACCEPTABLE 	10
<p>Criteria 2: Route to Market (Market Entry) Experience</p> <ul style="list-style-type: none"> Credentials and Experience relevant to the scope of work under this RFP, the service provider should show: market entry strategies, market landscaping analysis, market sizing strategies, and new product launch strategies and demonstrate the ability to conduct multi-country studies simultaneously, in addition, experience with research and strategy work in each of the countries specified. <p>Ability and capacity to work on Route to market or Market entry:</p> <ul style="list-style-type: none"> More than 10 years of research and strategy experience and conducting parallel multi-country studies - (Score 5) Less than 10 years and more than 8 years of research and strategy experience and conducting parallel multi-country studies - (Score 4) Less than 8 years and more than 6 years of research and strategy experience and conducting parallel multi-country studies - (Score 3) Less than 6 years and more than 4 years of research and strategy experience and conducting parallel multi-country studies - (Score 2) Less than 4 years and more than 2 years of research and strategy experience and conducting parallel multi-country studies - (Score 1) Less than 2 years of research and strategy experience and conducting parallel multi-country studies - (Score 0) 	15

<p>Criteria 3: Methodology and approach:</p> <ul style="list-style-type: none"> • 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 • The service provider should demonstrate that they have considered possible limitations to the study and advise how to mitigate potential limitations • Show examples of previous outputs on other studies similar in scope and purpose. What the report emanating from the study will look like (using dummy data) or anonymising the client brand to respect privacy/confidentiality <p><u>Methodology and approach requirements:</u></p> <ol style="list-style-type: none"> 1. Bidders to provide a clear and robust research methodology that suits the objectives of the study and motivate the chosen methodology 2. Bidder must provide a detailed description of their data collection techniques, such as qualitative, quantitative, or mixed, suitable for the study. Outlining their validity and reliability. 3. Bidder needs to outline the sampling framework for the study and motivation for the choice of sampling methodology 4. Demonstrate that they have considered possible limitations to the study and advise how to mitigate potential limitations 5. Bidder has provided a sample report or output of the study showcasing the final deliverable for SA Tourism <p><u>Scoring: As per Table 4: Functional Evaluation Matrix</u></p> <ul style="list-style-type: none"> • Provision of the above five methodology requirements will be deemed ACCEPTABLE • Methodology that is not aligned to the above five requirements will be deemed UNACCEPTABLE 	<p>25</p>
<p>Criteria 4: Company infrastructure and capacity in the 6 markets:</p> <ul style="list-style-type: none"> • Provide evidence of a field force and fielding tools in the specified countries • 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) • 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. <p><u>Company infrastructure and capacity requirements:</u></p> <ol style="list-style-type: none"> 1. Bidder must provide evidence of field force and fielding tools in the specified countries 2. Bidder should relate quality measures (data validation assessment) that are applied by the entity to ensure that the data is of sound quality 3. Bidder needs to demonstrate compliance with data laws of each country 4. Bidders must demonstrate the usage of advanced technologies, tools, or methods to execute the study 	<p>20</p>

<p><u>Scoring: As per Table 4: Functional Evaluation Matrix</u></p> <ul style="list-style-type: none"> Provision of the above four requirements will be deemed ACCEPTABLE Infrastructure and capacity that is not aligned to the above four requirements will be deemed UNACCEPTABLE 	
<p>Criteria 5: Expertise and experience of proposed project lead or main subject matter expert:</p> <ul style="list-style-type: none"> The proposed project team leader that will be assigned to the project and their experience. Provide details CV <p>The research Project leader should have:</p> <ul style="list-style-type: none"> More than 10 years market entry strategy or market sizing strategy or new product launch strategy development experience - (Score 5) Less than 10 years and more than 8 years market entry strategy or market sizing strategy or new product launch strategy development experience - (Score 4) Less than 8 years and more than 6 years market entry strategy or market sizing strategy or new product launch strategy development experience - (Score 3) Less than 6 years and more than 4 years market entry strategy or market sizing strategy or new product launch strategy development experience - (Score 2) Less than 4 years market entry strategy or market sizing strategy or new product launch strategy development experience years (Score 1) 	8
<p>Criteria 6: Expertise and experience of the proposed team:</p> <ul style="list-style-type: none"> The proposed project team that will be assigned to the project and their experience. Provide details CV <p>Support team members should have a combined average of:</p> <ul style="list-style-type: none"> More than 8 years market entry strategy or market sizing strategy or new product launch strategy development experience - (Score 5) Less than 8 years and more than 6 years market entry strategy or market sizing strategy or new product launch strategy development experience - (Score 4) Less than 6 years and more than 4 years market entry strategy or market sizing strategy or new product launch strategy development experience - (Score 3) Less than 4 years and more than 2 years market entry strategy or market sizing strategy or new product launch strategy development experience - (Score 2) Less than 2 years market entry strategy or market sizing strategy or new product launch strategy development experience years (Score 1) 	8

<p>Criteria 7: A detailed project implementation plan with timelines from inception to completion of the project; (with deliverables and dependencies). Bidders must provide a detailed description of how they intend to execute the study from inception to completion. This must include, as a minimum, a project plan with clear timeframes, skills, and resources utilised in each area</p> <p>Scoring: As per Table 4: Functional Evaluation Matrix</p> <ul style="list-style-type: none"> A detailed project plan with timelines from inception to completion, dependencies, deliverables, skills, and resources required will be deemed ACCEPTABLE No detailed project plan with no timelines from inception to completion, no dependencies, no deliverables, no skills, and resources required will be deemed UNACCEPTABLE 	14
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 submit supporting documentation for all functional requirements as indicated in the Terms of Reference as part of their bid documents. 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 a score between (0-5) which will be multiplied by the weight for each criterion using the following value scale/matrix and those scored broken down on the functional evaluation criteria above.
- The scores allocation of 0-5 that are not defined on the functional evaluation table above will be evaluated as per the below matrix:

Table 4: Functional Evaluation Matrix

Rating	Definition	Score
Excellent	Exceeds 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.	5
Good	Satisfies the requirement with minor additional benefits . 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.	4

Acceptable	Satisfies 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.	3
Minor Reservations	Satisfies the requirement with minor reservations . 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.	2
Serious Reservations	Satisfies the requirement with major reservations . 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.	1
Unacceptable	Does not meet the requirement . 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.	0

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 80/90) and the total points for BBBEE evaluation (out of 20/10) 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 with whom 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. That was tendered for.

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 (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8

6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	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.

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