



## SOUTH AFRICAN TOURISM

### PART C: TENDER EVALUATION PROCESS- SAT TENDER 204/22 - DEPARTURE SURVEY

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 70% 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 70% on phase 2 will be evaluated on the 80/20 or 90/10 preference points 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 and If the lowest acceptable tender is above R50 million, the 90/10 preference point system must be used.

#### 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 providers' 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 (South African Companies) 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> (Failure to submit sworn affidavit will result in non-compliant on a preference points system) (South African Companies only)
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 (CSD)		All agencies, including proposed partner/subcontractor agencies, must be registered as a service providers 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 <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.

### 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 70% to proceed to Phase 3 for Price and B-BBEE level contribution evaluations.

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

Evaluation criteria	Weighting
<p>1. Experience relevant to the scope of work and the number of projects of a similar nature that was conducted by your firm previously. 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.</p> <p>Years in conducting similar work. Provide evidence</p> <ul style="list-style-type: none"> <li>1 - 4 years = 3</li> <li>5 - 9 years = 4</li> <li>10 or more years = 5</li> </ul>	15
<p>2. Similar experience in multiple research studies. The service provider is required to provide case studies of completed projects.</p> <ul style="list-style-type: none"> <li>1-3 projects completed = 3</li> <li>3-5 similar projects completed = 4</li> <li>6 or more similar projects completed = 5</li> </ul>	15

<p>3. Methodology (how clearly the methodology is presented; the soundness of the methodology judged in terms of research methodologies, analyses tools, presentation of data, and innovation) - (virtual presentation)</p> <p>a. Sampling Methods (How to intercept respondents, ensure representativity of the people we want to measure)</p> <p>b. Piloting</p> <p>c. Detailed data collection method</p> <p>d. Weighting</p> <p>e. Data editing, cleaning, and imputation method(s)</p> <p>f. Data coding</p> <p>g. Data verification</p> <p>h. Data processing</p> <p>i. Data analysis methods</p> <p>j. Integration with SA Tourism historic data</p> <p>k. Description of International best practices on innovation regarding data collection and processing (to improve time lag)</p> <p>l. Open to monitoring and evaluation of SA Tourism processes (provide evidence - recordings, GPS coordinates)</p> <p>m. Proposed project plan and timelines (Fieldwork duration, analytics, reporting)</p> <p>n. Interactive dashboard demonstration with top-line indicators (virtual presentation)</p> <ul style="list-style-type: none"> <li>• Bidder is required to show experience in setting up and managing dashboard reporting This must be shown in the form of a demo.</li> <li>• Demo capability using PowerBi for dashboards/reports</li> <li>• Present dashboards that the bidder has worked on/developed in the past</li> <li>• Provide a process to be followed to ensure access and security to the dashboards/reports</li> </ul>	35
<p>4. Innovation and efficiency in all survey processes, i.e. From data collection to dissemination to meet real-time / almost real-time data.</p>	20
<p>5. Team structure and high-level credentials of key people who will be assigned to the project</p> <p>a. Credentials of the Field Manager(s), please provide a detailed CV/profile</p> <ul style="list-style-type: none"> <li>• No CV/profile in line with the above requirements = 0</li> <li>• Less than 7 years =0</li> <li>• 8 - 10 years =1</li> <li>• 11 - 14 years =2</li> <li>• 15+ years =3</li> </ul> <p>b. Credentials of the Project Lead(s), please provide a detailed CV/profile</p> <ul style="list-style-type: none"> <li>•</li> <li>• No CV/profile in line with the above requirements = 0</li> <li>• Less than 7 years =0</li> <li>• 8 - 10 years =1</li> <li>• 11 - 14 years =2</li> <li>• 15+ years =3</li> </ul> <p>NB: The score for the two resources will be averaged.</p>	15
	100 total

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>3</b>
<b>Acceptable</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>2</b>
<b>Average</b>	Submission meets the minimum requirement with <b>major reservations</b> . Considerable reservations of the supplier's relevant ability, understanding, experience, skills, resources, 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, resources & 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 or 90+10) = 100 points**

Only bidder(s) who meets the minimum threshold of 70% for the pitch presentation during Phase 3 will be further evaluated for comparative price and BBBEE level of contribution.

SA Tourism will consolidate the total points for price evaluation (out of 80/20 or 90/10) and the total points for BBBEE evaluation (out of 20/10). The bidder who scores the highest points for comparative pricing and B-BBEE status level of contributor after the consolidation of points will normally be considered the preferred bidder 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 bidder, all other bidders will be considered unsuccessful.

In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution following 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

#### Objective Criteria

The recommended bidder will be required to submit a full set of the latest financials upon request from South African Tourism. SA Tourism may assess the financial health (Liquidity, solvency ratio, etc.) of the recommended bidder. Should the result of the financial assessment reflect financial distress that may hinder the supplier from successfully delivering the project, SA Tourism reserves the right not to award the Bid to the highest point scorer.

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 unsuccessful.

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