



**PART C: TENDER EVALUATION PROCESS - (SAT TENDER NUMBER 210/22 ALL-RISK COMPREHENSIVE INSURANCE).**

Summary of the Evaluation Phases (table below):

**Table 1: Evaluation Summary**

Phase 1 Administrative and Mandatory bid requirements	Phase 2 Functional Technical Evaluation	Phase 3 Price and B-BBEE Evaluation
Bidders' responses will be evaluated based on table 2 below.	Only bidder(s) who score <b>75%</b> and above on phase 2 will proceed to Phase 3.	The tender will be evaluated on either the 80/20 preference point system.

**Phase 1: Administrative and mandatory bid requirements**

**Proof of Company registration with a Professional Insurance Association, Regulatory Body, or Affiliation.**

**Proof of valid membership certificates of the Key Account Manager.**

All documents must be completed and signed by the duly authorised representative of the prospective bidder(s). During this phase, bidders' 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
B - BBEE Certificate 1		B - BBEE Certificate (South African Companies) or, for companies that have less than R10 million turnover, an affidavit 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 an affidavit will result in non-compliant on the preference points system)
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 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.
Annexure E-Declaration of Interest - SBD 4)		Complete and sign the supplied pro forma document
Annexure D-Preferential Procurement SBD 6.1		Complete and sign the supplied pro forma document

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

All bidders 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.

Bidders 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**

Deliverables / Performance Indicators (The below criterion will be evaluated based on the matrix as per table 4)	Weight Allocated	Reference pages in the bidder's proposal.
<b>Evaluation criteria</b>		
<p>1. The bidder must have a solid track record of at least three (3) years or more experience in the provision of insurance brokerage services. The bidder must provide reference letters, from clients where similar services were provided. The bidder must have experience demonstrable in Insurance and/or brokerage services - Company profile/reference letters Indicating similar work/service experience.</p> <ul style="list-style-type: none"> <li>- 1 = at least 3 years experience in insurance brokerage services</li> <li>- 2 = 4 to 5 years of experience in insurance brokerage services</li> <li>- 3 = 6 or more years of experience in insurance brokerage services</li> </ul> <p>Provide a list of at least three (3) contactable references of current or previous clients who are of a similar size to the South African tourism whom we may contact for references. The letter must include the company name, contact name, address, phone number, duration of the contract, or value of insured goods and/or services, and a brief description of the services that the bidder has provided.</p> <p>NB: South African Tourism reserve the right to contact the referees and attain the level of satisfaction.</p> <p>0 (0) = none scoring will be evaluated as follows: No submission/irrelevant experience/less than three (3) years in insurance brokerage services;</p> <ul style="list-style-type: none"> <li>• Less than three (3) contactable references;</li> <li>• No indication of years of experience on a provided list of past or existing experience.</li> <li>• Submission of appointment letters/purchase orders or contracts instead of reference letters.</li> </ul> <p>NB: Reference (s) or years of experiences will be calculated/measured as per the provided information dating back from the closing date.</p>	45	

<p>Contactable References. (letter of references on the letterhead of the clients, signed by a senior/head of relevant unit).</p>												
<p><b>2. Company’s key personnel experience</b></p> <ul style="list-style-type: none"> <li>▪ Detailed CVs and certified copies of relevant qualifications of the company’s key personnel and contact persons that would be handling this account             <ul style="list-style-type: none"> <li>- Key Account Manager                 <ul style="list-style-type: none"> <li>1 = at least 3 years of experience in insurance brokerage services for Corporate clients</li> <li>2 = 4 to 5 years of experience in insurance brokerage services for Corporate clients</li> <li>3 = 6 or more years’ experience in insurance brokerage service for Corporate clients</li> </ul> </li> </ul> </li> </ul> <table border="1" data-bbox="352 752 863 1088"> <thead> <tr> <th>Total Number of Bidders’ Experience</th> <th>PLEASE TICK (✓)</th> </tr> </thead> <tbody> <tr> <td>Less than 3 years</td> <td></td> </tr> <tr> <td>At least 3 years</td> <td></td> </tr> <tr> <td>4 - 5 years</td> <td></td> </tr> <tr> <td>6 years and above</td> <td></td> </tr> </tbody> </table> <p>NB: Bidders are required to provide proof to substantiate the applicable years of experience</p>	Total Number of Bidders’ Experience	PLEASE TICK (✓)	Less than 3 years		At least 3 years		4 - 5 years		6 years and above		25	
Total Number of Bidders’ Experience	PLEASE TICK (✓)											
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<p><b>3. Proposed innovations to reduce the cost of insurance and risks</b></p> <ul style="list-style-type: none"> <li>▪ Case studies with contact details where innovative insurance and risk management solutions were provided             <ul style="list-style-type: none"> <li>- The method and duration of processing payments and claims</li> </ul> </li> </ul>	30											
<p>Total Weight</p>	100											

- Bids proposals will be evaluated strictly according to the bid evaluation criteria stipulated in this section.
- As part of their bid documents, bidders must submit supporting 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 criterion on the bid evaluation score sheet using the following value scale/matrix:

**Table 4: 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 66,70% 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

Upon the successful negotiation and signing of a contract and services level agreement with the preferred bidder, all other bidders will be considered unsuccessful.

**END.**