



PART C: TENDER EVALUATION PROCESS- SAT TENDER 276/24 - BUSINESS EVENTS BRAND EQUITY SURVEY

Table 1: Evaluation Summary of the Evaluation Phases (table below):

| Phase 1 Pre-qualification Criteria | Phase 2A Technical Evaluation Criteria (Desktop) | Phase 2B Technical Evaluation Criteria (Pitch Presentation) | Phase 3 Price and Specific Goals Evaluation |
|---|---|---|---|
| Bidders' responses will be evaluated based on compliance with the listed administrative requirements. | <p>A bidder will be evaluated out of 100% and is required to score a minimum threshold of 70% to qualify for the pitch presentation in Phase 2B</p> <p>The Tender/Evaluation Matrix Cross Reference: Service providers should reference the criteria to the portfolio of evidence in the bid proposal.</p> | <p>A bidder will be evaluated out of 100% and is required to score a minimum threshold of 70% to be evaluated further in the next phase of evaluation in phase 3 (Price and Specific Goals).</p> | <p>Service provider(s) who achieved a minimum threshold of 70% in phase 2 will be evaluated on the 80/20 or 90/10 preference points system.</p> <p>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.</p> |

Phase 1: Administrative and Mandatory bid evaluation

All documents must be completed, each page initialized and signed by the duly authorized 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.

Phase 2: Desktop 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.

The technical functional evaluation (functionality) will comprise of two (2) phases:

Phase 2A will measure the responsiveness of proposals as per submission on or before the closing date and time of the bid and Phase 2B will comprise of Pitch Presentation.

Phase 2A Desktop technical functional evaluation - A bidder will be evaluated out of 100% and is required to score a minimum threshold of **70%** to qualify for the pitch presentation in Phase 2B

Phase 2B Pitch Presentation -A bidder will be evaluated out of 100% and is required to score a minimum threshold of **70%** to be evaluated further in the next phase of evaluation phase 3 (Price and Specific Goals).

Table 3: Phase 2A: Desktop Technical Functional Evaluation

| Deliverables/ Performance Indicators | Weight |
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| <p>Criterion 1:</p> <ul style="list-style-type: none"> • Credentials and Experience relevant to the scope of work under this RFP, service provider should show experience in brand studies, tracker studies, and size (multi-country studies); • The service provider is required to provide a minimum of three (3) and a maximum of five (5) 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. • Service provided 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>Conditions/Non scoring factors:</p> <p>The scoring will be allocated as such;</p> <p>▫ If you provide five (5) reference letters, and they are within the stipulated four - year period, on a client letterhead, clearly stating the nature of market research work done - 3</p> <p>▫ If you provide four (4) reference letters, and they are within the stipulated four - year period, on a client letterhead, clearly stating the nature of market research work done - 2</p> <p>▫ If you provide three (3) reference letters, and they are within the stipulated four - year period, on a client letterhead, clearly stating the nature of market research work done - 1</p> <p>Non-scoring (0 point)</p> <p>▫ If you provided reference letters, but they are not within the 4 years AND/OR not on a client letterhead, AND/OR not clearly stating the nature of market research work done</p> <p>Less than three reference letters</p> <p>▫ No reference letters of similar work done</p> <p>▫ Irrelevant experience provided</p> <p>▫ Reference letters older than 4 years</p> | 5 |
| <p>Criterion 2:</p> <ul style="list-style-type: none"> • Potential bidders are required to demonstrate an understanding of the competitive bidding process within the Conferencing and Business Events sector, bidders are required to provide a compelling case of the state of conferencing OR on the state of Business Events through a multimedia visual presentation <p>Bidders will be required to provide a Multimedia visual presentation of a maximum of ten (10) minutes</p> | 10 |

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| NB: A functional evaluation matrix will be applied for scoring | |
| <p>Criterion 3:</p> <p>Research Design: Comprehensive application of the research design and demonstrate</p> <p>Understanding of the business goal/problem</p> <ul style="list-style-type: none"> to include; <ul style="list-style-type: none"> Research methodology, data collection, sampling While adding a rationale as to why the proposed research design is the best in answering the business problem Service provider should demonstrate that they have considered possible limitations to the study and advise how to mitigate possible limitations Bidders are to include in their proposal output examples of what the report emanating from the study will look like (using dummy data) - NB <p>NB: A functional evaluation matrix will be applied for scoring</p> | <p>40</p> |
| <p>Criterion 4: Infrastructure and capacity</p> <ul style="list-style-type: none"> Demonstrate data processing capabilities including software that will be used to process data 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 - store and confiscate data after expiration of contract) Show how efficient and technologically advanced the tools, methods employed in the project are. <p>NB: A functional evaluation matrix will be applied for scoring</p> | <p>20</p> |
| <p>Criterion 5: Proposed project team that will be assigned to the project and their experience</p> <p>(The Bidder is required to provide a Curriculum Vitae, to support the years of experience):</p> <p>The Advisory person should have at least 5 years of experience in Business Events research and should also have</p> <ul style="list-style-type: none"> 20+ years of research experience, and at least 5 years of Business Events research experience (3 points) 10 - 19 years of research experience, and at least 5 years of Business Events research experience (2 points) 5 - 9 years of research, and at least 5 years of Business Events research experience (1 point) Less than 5 years of research experience, and at least 5 years of Business Events research experience (0 points) No CV in line with the above requirements (0 Points) | <p>5</p> |
| <p>Criterion 6: Proposed project team that will be assigned to the project and their experience</p> <p>(The Bidder is required to provide a Curriculum Vitae, to support the years of experience):</p> <p>Research Project leader should also have at least 3 years of experience in Business Events research and;</p> <ul style="list-style-type: none"> 10+ years of research experience, and at least 3 years of Business Events research experience (3 points) | <p>5</p> |

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| <ul style="list-style-type: none"> • 7 - 9 years of research experience, and at least 3 years of Business Events research experience (2 points) • 5 - 6 years of research experience, and at least 3 years of Business Events research experience (1 point) • Less than 5 years of research experience, and at least 3 years of Business Events research experience (0 points) • No CV in line with the above requirements (0 Points) | |
| <p>Criterion 7: Proposed project team that will be assigned to the project and their experience</p> <p>(The Bidder is required to provide a Curriculum Vitae, to support the years of experience):</p> <p>The bidding company should allocate to the project a minimum of 3 support team members and Support team members will be evaluated according to the collective years of experience:</p> <ul style="list-style-type: none"> • 15+ years of collective research experience (3 points) • 11 - 14 years of collective research experience (2 points) • 8 - 10 years of collective research experience (1 point) • Less than 8 years of collective research experience (0 points) • No CV in line with the above requirements (0 Points) | 5 |
| <p>Criteria 8:</p> <p>The bidding company should demonstrate that they have market support personnel for the specified 16 -18 markets. The market support personnel should have sound local market knowledge with at least 5 years of experience in the market or their assigned geographical coverage.</p> <p>(The Bidder is required to provide a short two-paragraph resume, stating the geographical coverage/years in the market, as well as showing market knowledge/market specialty)</p> <ul style="list-style-type: none"> • Support in 16 - 18 markets (3 points) • Support in 13 - 15 markets (2 points) • Support in 10 - 12 markets (1 points) • Support in less than 10 markets (0 points) • No support/experience in line with the above requirements (0 points) • Less than 5 years of market experience (0 points) <p>NB: A functional evaluation matrix will be applied for scoring</p> | 5 |
| <p>Criterion 9:</p> <ul style="list-style-type: none"> • A detailed project implementation plan with timelines from inception to completion of the project; (with deliverables and dependencies) • The timelines should be aligned to the time frame stipulated in Part B and should be shown across the 3-year period | 5 |
| TOTAL | 100 |

Table 4: Phase 2B: Technical Functional Evaluation (Pitch Presentation)

| Evaluation criteria | Weighting |
|---|-----------|
| <p>Criterion 5:</p> <p>Bidders will be evaluated on their understanding of the business problem, their interpretation of the business, and the proposed research design.</p> <p>Bidders will have to demonstrate their overall understanding of the scope of work;</p> <p>And outline;</p> <ul style="list-style-type: none"> • Business objective/s • Research objective/s • Proposed approach, and why the bidder recommends their proposed approach • A mock example of study outcomes <p>NB: A functional evaluation matrix will be applied for scoring</p> | 50 |
| <p>Criterion 4: Infrastructure and capacity</p> <ul style="list-style-type: none"> • Demonstrate data processing capabilities including software that will be used to process data • Demonstrate methods of how data quality will be ensured (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 - store and confiscate data after expiration of contract) • Show how efficient and technologically advanced the tools, and methods employed in the project are. <p>NB: A functional evaluation matrix will be applied for scoring</p> | 25 |
| <p>Criteria 8:</p> <p>The bidding company should demonstrate that they have market support personnel for the specified 16 -18 markets. The market support personnel should have sound local market knowledge with at least 5 years of experience in the market or their assigned geographical coverage.</p> <p>(The Bidder is required to support what was stipulated in the proposal regarding their market coverage and expertise.</p> <p>NB: A functional evaluation matrix will be applied for scoring</p> | 25 |
| Total points | 100 |

- 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 5: Technical 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. | 3 |
| Acceptable | 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. | 2 |
| Average | Submission meets the minimum 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, resources & quality measures required to provide the goods/services, with little or no supporting evidence. | 0 |

Phase 3: Price and Preference (specific goals) Evaluation (80/20) = 100 points

Only Bidders who meet the minimum 70% threshold of functionality in Phase 2 will be evaluated in Phase 3 for price and preference (Specific goals).

The total points for price evaluation (out of 80) and the total points for specific goals evaluation (out of 20) will be consolidated. The bidder who scores the highest points for comparative pricing and specific goals after the consolidation of points will normally be considered the preferred bidder with whom South African Tourism will enter into further negotiations for the contract.