



## SOUTH AFRICAN TOURISM

### PART C: TENDER EVALUATION PROCESS (SAT TENDER NUMBER NORTH AMERICA 248/24 - INTEGRATED MARKETING AND COMMUNICATION AGENCY)

Summary of the Evaluation Phases (table below):

Phase 1 Administrative and Compliance requirements	Phase 2A Technical Evaluation Criteria (Desktop)	Phase 2B Technical Evaluation Criteria (Pitch Presentation)	Phase 3 Price and Specific Goals
Bidders must submit all documents as outlined under paragraph 9.5.1 PART A, B & C.	<p>Bidder(s) are required to achieve a minimum threshold of 60% to proceed to Phase 2B.</p> <p>The Tender/Evaluation Matrix Cross Reference: Bidders 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.</p>	<p>Only bidder(s) who score 60% and above on phase 2A will be invited for a pitch presentation.</p> <p>Bidder(s) are required to achieve a minimum of 70% to proceed to Phase 3.</p>	<p>Tenders will be evaluated on either the 80/20 or 90/10 preference point 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.</p> <p>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.</p>

#### Phase 1: Evaluation Requirements

Without limiting the generality of South African Tourism's other critical requirements for this Bid, the bidder(s) must submit all required documents.

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. The bidder(s) proposal will be disqualified for the non-submission of the required documents unless stipulated otherwise.

The document 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>(Only applicable to companies with a legal entity in South Africa)</i>
B - BBEE Certificate 1		B - BBEE Certificate (South African Companies) or, for companies with less than R10 million turnover, a sworn 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> <i>(Failure to submit a sworn affidavit will result in non-compliant on the preference points system, not disqualification criteria) (Only applicable to companies with a legal entity in South Africa)</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 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

## Phase 2: Technical Evaluation Criteria = 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 two (2) phases:

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

**Phase 2 A Desktop technical, functional evaluation-** A bidder will be evaluated out of 100% and is required to score a minimum threshold of 60 % to qualify for Pitch Presentation Phase 2. B

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

<p>Evaluation criteria (The below criterion will be evaluated based on the Functional Evaluation Matrix)</p> <p>NB: The criterion will be evaluated in accordance with the Technical Functional evaluation matrix</p>	Weighting	Reference Page in Bidder's Proposal
<b>Phase 2 A- Desktop Technical Evaluation Criteria</b>		
<p><b>Criteria 1.</b></p> <p>Creative strategy: Expertise and experience in brand &amp; creative strategy development, localisation/regionalisation of content, and execution - Showcase examples of what you would do for South African Tourism given the above business problem in the scope of work. Ability to design dynamic creative for programmatic-driven campaigns.</p>	20	
<p><b>Criteria 2.</b></p> <p>Creative execution and campaign mechanics: provide 2 case studies of what you have previously done including work done for alternative creative/lifestyle clients and showcase an example of what you would do for South African Tourism.</p> <p>Agency credentials and servicing team: The agency will be expected to present these practical case studies of past work that clearly illustrates its ability to interpret global brand strategies and the localisation of promotional, sales drive, and retail campaigns. One of the case studies must include promotions that were created and developed for a DMO/s and/or other tourism players. The agency also needs to show proven experience of the proposed team to be deployed to the project. The number of years (min 7) and level of experience of the proposed team member.</p> <p>For campaign mechanics, please showcase the approach, service, and tools that will be made available to South African Tourism.</p>	50	
<p><b>Criteria 3.</b></p> <p>Measurement and reporting: brand performance monitoring, competitor creative performance tracking, and reporting - approach, service, and tools that will be made available to South African Tourism. Understanding of the full/entire Google Marketing Platform stack.</p>	10	
<p><b>Criteria 4.</b></p> <p>Intelligence and information usage: Showcase understanding of the tourism industry and levers that can be used for impact. The agency will have to be able to deliver an insight report with learnings after every campaign element and a complete insights deck on campaign completion. The agency must indicate how 'live' insights will be delivered and cross-reference how these updated insights will be used to</p>	20	

optimise the campaign and how these insights will be used to craft and refine future campaigns.		
<b>TOTAL FOR PHASE 2A</b>	100	

**Phase 2 B 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 (Price and B-BBEE).

Bidders will be required to achieve a minimum threshold of 70% on pitch presentation in order to proceed to Phase 3 for price and B-BBEE.

Evaluation criteria (The below criterion will be evaluated based on the Functional Evaluation Matrix)	Weighting	Reference Page in Bidder's Proposal
Phase 2 A- Desktop Technical Evaluation Criteria		
<b>Pitch Presentation</b>	20	
<ul style="list-style-type: none"> <li>Bidders' capability to provide the required services, this may include but is not limited to resources e.g. staff, and regional footprint, in line with SAT's request for proposals</li> </ul>	30	
<ul style="list-style-type: none"> <li>Proposal in line with your understanding of what the scope of work entails including examples of solutions proposed</li> </ul>	20	
<ul style="list-style-type: none"> <li>Agency methodology and approach to the respective marketing discipline</li> </ul>	20	
<ul style="list-style-type: none"> <li>Interpretation of SA Brand and market insights</li> </ul>	10	
<ul style="list-style-type: none"> <li>Any value-added services bidders are able to offer relevant to this scope of services</li> </ul>		
Bidders must refer to Annexure A Pitch Deliverables (case study)		
<b>TOTAL FOR PHASE 2B</b>	<b>100</b>	

- Bids proposals will be evaluated strictly according to the bid evaluation criteria stipulated in this section.
- Bidders 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:

## 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: Pitch Presentation**

The shortlisted agencies who qualify after the technical evaluation (Phase 2A) will be expected to present a short pitch revert against the background, environment, and scope of work stated above. The shortlisted agencies will be given a written brief on the challenges, target market, competitor analysis, and pitch deliverables.

Bidders will be required to achieve a minimum threshold of 70% in order to proceed to Phase 3 for Price and Specific goals evaluations. Bidders who do not achieve the minimum threshold, which translates to a minimum score of 70 out of a possible maximum score of 100 %, will be disqualified

**Phase 3: Price and Specific Goals Evaluation (80+20 or 90+10) = 100 %**

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

The total points for price evaluation (out of 80/90) and the total points for specific goals evaluation (out of 20/10) 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 as the preferred bidder with whom South African Tourism will enter into further negotiations for the respective marketing discipline that was tendered.

**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.

**END**