



SOUTH AFRICAN TOURISM

PART C: TENDER EVALUATION PROCESS (SAT TENDER NUMBER 283/24 - 360 INTEGRATED MARKETING AND COMMUNICATION AGENCY FOR BRAZIL)

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 Evaluation
Bidders must submit all documents as outlined under paragraph 8 on Part A for this tender document	Bidder(s) are required to achieve a minimum threshold of 60% to proceed to Phase 2B. 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.	Only bidder(s) who score 60% and above on phase 2A will be invited for a pitch presentation. Bidder(s) are required to achieve a minimum of 70% to proceed to Phase 3.	The bidder who advances to Phase Three (3) will be evaluated based on Price comparison, and SA Tourism will appoint the bidder who is cost-effective.

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 the government's authorised tax authority may, on an ongoing basis during the tenure of the contract, disclose the bidder's tax compliance status.
Annexure A-Invitation (SBD 1)		Complete and sign the supplied pro forma document
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).

Evaluation criteria (The below criterion will be evaluated based on the Functional Evaluation Matrix) NB: The criterion will be evaluated in accordance with the Technical Functional evaluation matrix	Weighting	Reference Page in Bidder's Proposal
Phase 2 A- Desktop Technical Evaluation Criteria		
Criteria 1. Creative strategy: Expertise and experience in brand & 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.	30	

Criteria 2 Creative execution of the 360-degree campaign mechanics with more emphasis on digital mechanics: Provide 3 verified 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 linked to the creative strategy you have outlined in criteria 1 above. When demonstrating this, include measurement and reporting tools that you would make available to SA Tourism for brand performance monitoring, creative performance tracking and competitor tracking. 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. Non-scoring factors • Submission of less than 3 verified case studies • Lack of submission of specific SA Tourism proposed solution	40	
Criteria 3: Agency credentials and servicing team: The bidder needs to provide an organogram and agency structure indicating levels of experience of the team with their summarised CVs. Bidder must have a minimum of 7 years proven experience as a marketing agency. Bidder to also indicate the actual proposed team to be deployed to the SA Tourism account. This includes but is not limited to the account director, strategy lead, digital and social lead, creative lead, PR & media lead, travel trade lead, or equivalent) Bidder can also provide evidence of awards received and recognition. Non scoring factors: • Lack of submission of staffing plan/ team envisioned to service the account (incl but not limited to strategy lead, creative lead, PR & media lead, social & digital lead, travel trade lead, account director or equivalent) • Less than 7 years' experience of proposed team members included in staffing plan	20	
Criteria 4. 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 optimise the campaign and how these insights will be used to craft and refine future campaigns.	10	

TOTAL FOR PHASE 2A	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 2B- Desktop Technical Evaluation Criteria		
Pitch Presentation	40	
Bidders' capability to interpret the business challenge, articulate the strategy and provide compelling, insights driven actionable solutions during the pitch. This proposal must be in line with what the understanding of the scope of work entails and should include examples of solutions proposed to the business		
Agency methodology and approach to the respective marketing discipline (with an emphasis on high-impact digital solutions)	30	
Interpretation of SA Brand and market insights	30	
Bidders must refer to Annexure A Pitch Deliverables (case study)		
TOTAL FOR PHASE 2B	100	

- 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
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, resources, 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: 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

- (i) In cases where SA Tourism had/has current/historic non-performances with a provider, SAT reserves the right not to appoint the specific provider and move to the next highest scoring bidder.
- (ii) Should the recommended bidder and SA Tourism not agree on the SLA regarding service performance, the penalty may be implemented as a mitigating factor to address the non-performance issues; SAT reserves the right to cancel/terminate the contract and move to the next acceptable bidder.
- (iii) 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.
- (iv) 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.

1. LIST OF RETURNABLES

BIDDERS SHOULD PLEASE ADHERE TO THE FOLLOWING INSTRUCTIONS

- a) TICK APPLICABLE BOX
- b) ENSURE THAT THE FOLLOWING DOCUMENTS ARE COMPLETED, SUBMITTED AND SIGNED WHERE APPLICABLE

ANNEXURES	DOCUMENT DESCRIPTION	YES	NO
PART A & B	IS THE BID INVITATION FORM, TERMS, AND CONDITIONS FOR BIDDING COMPLETED, SIGNED, AND SUBMITTED?		
SUPPLIER IS REQUIRED TO USE THE PRESCRIBED SEQUENCE IN ATTACHING THE ANNEXURES THAT COMPLETE THE BID OR RFQ DOCUMENT			
ANNEXURE A	IS THE STANDARD BID DOCUMENT (SBD4) FORM THE BIDDER'S DISCLOSURE COMPLETED, SIGNED, AND SUBMITTED?		
ANNEXURE B	IS THE BIDDER'S QUOTED PRICE OR FINANCIAL OFFER SUBMITTED AND ALIGNED WITH THE SCOPE OF WORK? OR STATED IN THE BELOW TABLE OF DESCRIPTION OF SERVICE/GOODS?		
ANNEXURE C	IS PROOF OF OWNERSHIP BY BLACK YOUTH ATTACHED IN THE FORM OF (A)) COPY OF THE FOUNDING DOCUMENTATION OF THE COMPANY WITH WHICH THE OWNERSHIP IS LISTED, (B) COPY OF THE ID-DOCUMENT(S) OF THE BLACK YOUTH.		

2. CRITERIA FOR BREAKING DEADLOCK IN SCORING a) IF TWO OR MORE OF THE TENDERERS HAVE SCORED EQUAL TOTAL NUMBER OF POINTS, THE CONTRACT WILL BE AWARDED TO THE TENDERER THAT SCORED THE HIGHEST POINTS FOR SPECIFIC GOALS; b) IF TWO OR MORE TENDERS SCORE EQUAL TOTAL NUMBER OF POINTS IN ALL RESPECTS, THE AWARD WILL BE DECIDED BY THE DRAWING OF LOTS
3. DELIVERIES a. ALL DELIVERIES MAY BE ACCOMPANIED BY A DELIVERY NOTE OR AN INVOICE OF AN OFFICIAL PURCHASE ORDER NUMBER AGAINST WHICH THE DELIVERY HAS BEEN AFFECTED b. DELIVERIES NOT COMPLYING WITH THE PURCHASE ORDER FORM MAY BE RETURNED TO THE SUPPLIER(S) AT THE SUPPLIER'S EXPENSE. SAT WILL NOT BE LIABLE FOR PAYMENT OF INCORRECTLY DELIVERED GOODS OR SERVICE c. BIDDERS SHOULD INDICATE THE PLANNED DELIVERY PERIOD (IN DAYS) FROM THE DATE AN ORDER IS ISSUED
4. POPIA DISCLAIMER 4.1. COMPLIANCE WITH THE PERSONAL INFORMATION ACT, 4 OF 2013 PERSONAL INFORMATION SHARED WITH THE SAT SHALL BE TREATED WITH CONFIDENTIALITY AND IN COMPLIANCE WITH THE PROTECTION OF PERSONAL INFORMATION ACT, 4 OF 2013 (POPIA) AND OTHER APPLICABLE LAWS. FOR PURPOSES OF THIS DISCLAIMER, "PERSONAL INFORMATION" SHALL BE DEFINED AS DETAILED IN THE PROMOTION OF ACCESS TO INFORMATION ACT, ACT 2 OF 2000 (PAIA) AND POPIA, AND "PROCESSING" AND "FURTHER PROCESSING" SHALL BE READ, INTERPRETED AND UNDERSTOOD AS DETAILED AND DEFINED IN POPIA. 4.2. CONSENT TO PROCESSING AND FURTHER PROCESSING OF PERSONAL INFORMATION THE SATMAY PROCESS AND FURTHER PROCESS RECEIVED PERSONAL INFORMATION, INTERNALLY OR EXTERNALLY, IN THE EXECUTION OF ITS MANDATE AND/OR AS REQUIRED BY LAW. THE SATMAY SHARE PERSONAL INFORMATION WITH ITS SERVICE PROVIDERS, AGENTS, CONTRACTORS, LEGAL AND OTHER PROFESSIONAL ADVISORS AUTHORISED TO PROCESS THIS INFORMATION. THE SATMAY THUS PLACE RECEIVED PERSONAL INFORMATION IN THE PUBLIC DOMAIN DUE TO THE NATURE AND REQUIREMENTS OF ITS WORK. 4.3. FURTHER PROCESSING OF PERSONAL INFORMATION YOU FURTHER GRANT THE SATEXPRESS AND/OR IMPLIED PERMISSION TO FURTHER PROCESS RECEIVED PERSONAL INFORMATION AND PLACE IT IN THE PUBLIC DOMAIN, IN THE EXECUTION OF ITS MANDATE AND STATUTORY OBLIGATIONS. 4.4. DUTY OF CARE THE SAT VALUES YOUR PRIVACY AND SHALL TAKE ALL REASONABLE MEASURES TO PROTECT RECEIVED PERSONAL INFORMATION. 4.5. EXEMPTION FROM LIABILITY THE SAT(INCLUDING ITS OFFICIALS AND/OR EMPLOYEES) ACCEPTS NO LIABILITY WHATSOEVER, FOR ANY LOSS, DAMAGE (WHETHER DIRECT, INDIRECT, SPECIAL, OR CONSEQUENTIAL), AND/OR EXPENSES OF ANY NATURE WHATSOEVER WHICH

MAY ARISE AS A RESULT OF, OR WHICH MAY BE ATTRIBUTABLE DIRECTLY OR INDIRECTLY, FROM INFORMATION MADE AVAILABLE HEREIN, OR ACTIONS OR TRANSACTIONS RESULTING THEREFROM

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