SOUTH AFRICAN TOURISM

PART C: - TENDER EVALUATION PROCESS FOR SAT TENDER NUMBER 366/26 - 360 INTEGRATED MARKETING AND COMMUNICATION AGENCY FOR NORTH AMERICA

Summary of the Evaluation Phases (table below):

Table 1: Evaluation Summary

Phase 1 Administrative and Mandatory Bid Requirements	Phase 2 Desktop Functional Technical Evaluation and Pitch Presentation	Phase 3 Price and Specific Goals Evaluation
Bidders' responses will be evaluated based on Table 2 and Table 3 below.	Desktop Functional Technical Evaluation is divided into two (2) phases, desktop technical functionality and pitch presentation, with a weighting of 100% for each phase. **Phase 2A:** Desktop technical functional evaluation on 100% (maximum threshold): • A bidder must meet a minimum threshold of **70%** on the desktop technical functional evaluation to be considered in the following evaluation phase, Phase 2B (Pitch Presentation). • Failure to meet the minimum threshold will result in disqualification in this phase. Bidders who meet the minimum threshold will be invited to a Pitch Presentation. **Phase 2B:** Pitch Presentation = 100% (maximum threshold): • The pitch presentation will be based on the Phase 2B evaluation criteria. • A bidder must meet a minimum threshold of 70% on the pitch presentation evaluation to be considered for Phase 3 and preference points (specific goals) evaluation. • Failure to meet the minimum threshold will result in disqualification in this phase. **NB: Bidders should reference the criteria to the portfolio of evidence in the bid proposal**	Only Bidders who meet the minimum 70% threshold of functionality in Phase 2 will be evaluated in Phase 3 (Price Evaluation). The highest-scoring bidder will be appointed on price.

Phase 1: Phase 1A and Phase 1B: Administrative and mandatory bid requirements

All documents must be completed and signed by the duly authorized 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 1A – Administrative Requirements

Administrative documents that must be submitted	YES/NO	
Confirmation of valid Tax Status		Written confirmation that US Federal, State, Local and all related tax returns are duly filed and recorded. SA Tourism may, on an ongoing basis during the tenure of the contract, need to disclose the bidder's tax compliance status. All relevant Tax Compliance certificates with a tax number.
Annexure A-Invitation (SBD 1)		• Complete and sign where applicable. If the bidder is found to have missed signing off or duly completed the SBD, SAT may require, within two working days, a sign-off or duly completed of the SBD, and failure will result in the bid being disqualified.
Annexure E-Declaration of Interest – SBD 4)		• Complete and sign where applicable. If the bidder is found to have missed signing off or duly completed the SBD, SAT may require, within two working days, a sign-off or duly completed of the SBD, and failure will result in the bid being disqualified.

Table 3: Phase 1B – Mandatory Requirements

Mandatory documents that must be submitted	YES/NO	Non-submission will result in disqualification
Proof of valid business address		Bidder to submit proof of address, Example, company registrations ,Utility bills that has the company's address, lease agreement, or any other formal document that can serve as a proof address. NB: Only agencies with physical presence and operating in the USA will be considered. Agencies based outside of the USA will not be considered. Affiliate agencies will not be considered.

Phase 2: Desktop Functional Technical Evaluation is divided into two (2) phases: desktop technical evaluation (Phase 2A) and pitch presentation (Phase 2B), with 100% weighting for each phase.

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 meet the business requirements of South African Tourism under this tender.

Bidders will be required to achieve a minimum threshold of **70%** in each of the phases to proceed to Phase 3 for Price and Specific Goals Evaluation.

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

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 Phase 2 B (Pitch Presentation).

Phase 2B: Pitch Presentation – Bidders will be evaluated out of 100% and are required to score a minimum threshold of **70%** to be evaluated further in Phase 3 (Price and Specific Goals Evaluation).

Important definitions:

South African Tourism develops the Integrated Brand and Marketing Strategies for the destination. The Integrated Marketing Strategy is then localised for the Americas region, to align with the region's business objectives, market insights, and the nuances of the specific markets (US and Canada) for better resonance. This is referred to as a localised campaign for a particular market. Localisation could adopt the entire global tourism marketing campaign or selected elements.
The localised marketing campaigns will have integrated elements of the marketing mix, which is packaged as an annual localised marketing campaign plan for reaching the target audience through platforms and channels. The localised marketing campaign is then executed to increase demand in the identified markets in Americas.

Table 4 : Phase 2A Desktop Functional Evaluation

Phase 2A - Desktop Technical Evaluation Criteria	Weight Allocated	Reference pages in the bidder's proposal
Company Expertise and Experience in Executing Integrated Marketing Campaigns. **Objective**: To assess the bidder's ability to conceptualize, localize, and execute integrated marketing campaigns in the USA and Canada Hub, with measurable results and operational understanding of local consumer and distribution channel landscapes. This includes evaluating the bidder's experience with multi-market campaigns, their ability to conceptualize integrated marketing campaigns with the relevant marketing mix (Digital, Brand Experiential, Media Buy etc) Illustrate your company's experience to the scope of work outlined in PART B: SCOPE OF WORK of this RFP. **Submission Requirements:** A. 2 different case studies you have implemented within the past five (5) years. I. One of the case studies must be for an international or regional DMO (destination marketing agency) II. Another case study must be from a different client (not a DMO) B. Each case study must be relevant to the scope of work in Part B of this RFP. You must submit a written contactable reference letter on the client's letterhead per case study submitted. C. The two case studies must be: - Executed within the past 5 years from different clients , to show diversity in your expertise.	**40**	

- Each must highlight **distinct marketing mix elements** and how these elements were incorporated to ensure integrated execution. **Case Study Required Elements:** Both case studies must be a maximum of 25 pages/slides each with clear headings per below which must illustrate the: 1. **Business challenge & campaign objective**. 2. **SMART** Key Performance Indicators/Targets and success criteria, 3. **The localised solution you implemented**, a brief outline of your approach. Proof of executions (clearly showcasing distinct marketing mix elements) 4. **Quantitative performance results** - outline the results against the KPIs and explain lessons learned **Criteria Scoring:** • **Score of 3** = - **The case study meets all submission requirements from A to C including all case study required elements from 1 to 4** - **Case studies are within past 5 years.** - **Two reference letters submitted on client letterhead** • **Score of 2** = - **The case study meets all submission requirements from A to C** - Any three (3) case study required elements are included in each case study. - **Case studies are within past 5 years.** - **Two reference letters submitted on client letterhead** • **Score of 0** = No submission requirements are met. Less than 2 case study submission No DMO case study submitted. Case study older than 5 years. Case study not supported by the reference letter		
Measuring and Reporting of an Integrated Campaign Objective: To assess the bidder's capability to measure and report against executed campaigns using verifiable tools and demonstrating data-led decision-making. **Submission Requirements:** Based on one (1) of the two (2) case studies you provided, submit the following requirements: Maximum 15 pages/slides and clearly reference the below elements required: **1. Measurement Framework** **Elements** - Approach to defining campaign objectives and success metrics. **2. Reporting and Dashboards** **Elements** - What reporting tools were used. - Highlight dashboards and report and frequency thereof **Criteria Scoring** • **Score of 3** = 2 submission requirements are provided addressing all three elements • **Score of 2** = 2 submission requirements are provided however missing one element • **Score of 0** = None of the submission requirements are provided. Only one elements submitted	**20**	

Service Team Experience and Capability relevant to the scope of work **Objective:** To evaluate relevant professional experience of the proposed team members to the scope of work in Part B of the RFP. Bidder may indicate awards received on the CVs. **Submission Requirements:** **Illustrate the level of expertise of your team in the various integrated marketing disciplines** 1. Provide a summary table aligned with the list of mandatory resources below, listing all the proposed core team members to be assigned to deliver to the scope of work as outlined in Part B of the RFP. The table must include: Team members name and clearly defined role. Map each team members' role to the specific function they will fulfil per Part B of scope. 2. Summarised CVs (one page) for each proposed team member **CVs Required Elements:** All CVs must include: 1. Full name, job title and role in the project 2. Relevant qualifications per role in the project 3. Years of professional experience in the marketing functional area 4. Areas of specialization 5. Current and/or previous clients/accounts serviced **Criteria Scoring** • **Score of 3** = Team includes 10 or more members with roles mapped to RFP scope of work functions. All summarised CVs include all (5) CV requirement elements. • **Score of 2** = Team includes 5-9 members with summarised CVs that include all required elements. • **Score of 1** = Team includes 4 members. CVs are incomplete or missing 1-2 requirements. • **Score of 0** = Fewer than 4 team members proposed. Most CVs are incomplete or irrelevant. NB: Please take note that you must write the appropriate position next to the resources we provided below if your company's designations differ from those of the listed resources. Each proposed role must be assigned to a separate, dedicated individual. Bidders are prohibited from proposing one person for multiple roles; submitting non-dedicated resources will result in non-compliance, and zero scoring.	**40**	
PHASE 2A TOTAL (Minimum threshold = 70%)	**100**	

List of Mandatory Resources

a) Account Manager
b) Head of Strategy
c) Creative Director
d) Media planner
e) Media buyer
f) Digital marketing manager
g) Content Planner
h) Campaign and Content Analyst
i) Reporting Specialist (social listening)
j) Senior Community Manager

Table 4: Phase 2B Pitch Presentation

Phase 2B - Pitch Presentation Evaluation Criteria	Weight Allocated	Reference pages in the bidder's proposal
Develop an integrated 360° marketing communication and creative strategy for the US and Canada Hub that aligns with South African Tourism's global brand goals **and addresses the destination brands' challenges and business objectives.** **Objective:** To assess whether the bidder can deliver a localized, strategically aligned, multi-channel communication solution across media, digital, social, brand experiential, content, PR, trade distribution channel that reflects a deep understanding of audience targeting and local market conditions. **Pitch Presentation Requirements:** Bidders must present a strategy document that includes the following elements: 1. **Strategic Framework** An insight-led strategy aligned to organizational goals clearly demonstrates an understanding of the South African Tourism's objectives, target audiences, and market dynamics. 2. **Integrated360° Communication Approach** Demonstrates a cohesive 360° integrated marketing approach in which an insight-led strategy and creative platform are translated consistently across relevant paid, owned, earned and partner channels. This should demonstrate appropriate integration of media, digital, social, content, public relations, influencer/creator marketing, partnerships, trade and consumer activations, as relevant to the campaign. The bidder should demonstrate how the integrated campaign connects relevant touchpoints across the customer journey from awareness and inspiration through consideration, planning and conversion, where applicable, with clear objectives and measurable KPIs. 3. **Creativity & Innovation** Originality and strength of the campaign concept, storytelling, and ability to differentiate the brand in a competitive environment. 4. **Market Adaptation** Localization of strategy with tailored initiatives for the USCAN hub. 5. **Execution Plan & Methodology** Clear implementation plan including timelines and deliverables **Pitch Presentation Criteria Scoring** • **Score of 3** = All 5 pitch presentation requirements are fully showcased. • **Score of 2** = 3-4 pitch presentation requirements are fully showcased. • **Score of 1** = Only 2 pitch presentation requirements are fully showcased. • **Score of 0** = None of the pitch presentation requirements were showcased, and/or the information is irrelevant, and/or incomplete. Less than two pitch presentation requirements is met.	**50**	
Identify one (1) potential innovative Synergistic Collaboration Opportunity for SA Tourism with relevant distribution channels. **Objective:** To evaluate the bidder's ability to identify, negotiate, and activate strategic, relevant collaboration opportunities that enhance campaign reach, has nuanced cultural resonance across the USCAN markets. The evaluation will consider alignment with SAT's brand, potential for multi-market impact, and evidence of readiness and feasibility. **Pitch Presentation Requirements:** Bidders must present one (1) clearly defined potential collaborative brand partnership that is aligned to South African Tourism's brand values and campaigns in the North Americas hub. For each collaboration, bidders clearly indicate and present the following: 1. **Partner, Brand Profile, and Rationale:**	**50**	

○ Possible collaboration partner (e.g., FMCG, Telecoms, Financial Services, broadcaster, digital platforms, Online Travel Agents (OTAs), Consortia and Associations, Interest Groups (sporting clubs, business and industry groups, etc.). ○ Relevance to SAT's audiences and campaign goals **2. Nature of potential Collaboration:** ○ Proposed collaboration model (e.g., content syndication, co-branded storytelling and/or brand experiential, barter media, influencer amplification, etc.) ○ Integration with planned integrated marketing campaign or campaign touchpoints. **3. Partner Exclusivity or Differentiation:** ○ Whether the potential opportunity offers SAT an exclusive position ○ Whether it taps into culturally relevant, localized distribution channels or underutilized platforms **Pitch Presentation Criteria Scoring** • **Score of 3** = All 3 pitch presentation requirements were presented. • **Score of 2** = 2 pitch presentation requirements were presented. • **Score of 1** = 1 pitch presentation requirement was presented. • **Score of 0** = No pitch presentation requirement was presented, or the content does not align with the SAT strategy or North American market focus; presentation was incomplete or irrelevant.		
PHASE 2B TOTAL (Minimum threshold = 70%)	**100**	

NB: Bidder/s will be required to present their costing during the pitch presentation phase.

- 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. Failure to meet the minimum threshold during Phase 2B will result in the bidder not qualifying for Phase 3.
- 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.

Phase 3: Price Evaluation

- Only Bidders who meet the minimum 70% threshold of functionality in Phase 2 will be evaluated in Phase 3 (Price Evaluation). The highest-scoring bidder will be appointed on price.
- The total points for price evaluation (out of 90) The bidder who scores the highest points for comparative pricing will be considered as the preferred bidder with whom South African Tourism will enter into contract negotiations for what was tendered for.