



SOUTH AFRICAN TOURISM

PART C: TENDER EVALUATION PROCESS - SAT TENDER NUMBER 339/26: APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A SEGMENTATION STUDY FOR A PERIOD OF THIRTY-SIX (36) MONTHS.

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

Phase 1 Pre-qualification Criteria	Phase 2A Technical Evaluation Criteria (Desktop)	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 be evaluated in Phase 3.</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>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.

Table 2: Phase 1 Evaluation (Administration Requirements)

Document submitted that must Be submitted	YES/NO	Description
Invitation SBD 1		Complete and sign the Standard Bidding Document
Declaration of interest (SBD 4)		Complete and sign the Standard Bidding Document
Preference points claim form in terms of the preferential		Complete and sign the Standard Bidding Document

procurement regulations 2022 (SBD 6.1)		
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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 be evaluated in phase 3.

Table 3: Phase 2A: Desktop Technical Functional Evaluation

Deliverables / Performance Indicators	Weight Allocated	Reference pages in the bidder's proposal.
Evaluation criteria		
<p>1. Experience Relevant to the Scope of Work (Evaluation of the bidder's years of experience conducting projects of a similar nature and scale, in segmentation and multi-country* studies. Bidders are to submit contactable references from previous clients where similar services were conducted successfully. References should be in the form of a formal written letter on a client's letterhead, and letter should be for work done within the past 5 years.</p> <p>*A multi-country market research study conducted across multiple regions and international markets as part of a single integrated research study</p> <p>This evaluation criteria will be evaluated in line with the functionality evaluation matrix below;</p> <p>3 reference letters which meet the criteria = 1 Point 4 to 5 Reference letters which meet the criteria = 2 points 6 or more than 6 reference letters which meet the criteria = 3 points</p> <p>NON-SCORING</p> <p>a. No Reference/less than 3 references which meet the criteria b. Submission of Appointment letters (and not reference letters) c. Submission of letter that is not relevant to scope of a segmentation and multi-country studies d. References in a form of email, list or any form other than a formal written letter from clients e. References for work older than 5 years</p>	15	
<p>2. Data Collection Approach and Methods</p> <p>1.Data collection</p> <p>a. Comprehensive detail on the data collection approach. b. Outline big data analytics usage, primary data methods, and region-specific collection nuances.</p> <p>2.Integration of Big Data</p>	30	

Deliverables / Performance Indicators	Weight Allocated	Reference pages in the bidder's proposal.
<p>c. Specify big data sources (e.g., social media, booking platforms) and analytical tools.</p> <p>d. Demonstrate how big data will produce actionable insights.</p> <p>3.Primary Data Collection</p> <p>e. Detail data collection method and rationale for data collection choice, (interview or focus group methods and sampling techniques).</p> <p>f. Provide a timeline with milestones for data collection.</p> <p>This evaluation criteria will be evaluated in line with the functionality evaluation matrix below</p> <p>Excellent = 3: Bidder submits and meets all 3 requirements, with clear details on each requirement</p> <p>Acceptable=2: Bidder submits and meets 2 requirements, with clear details outlining each requirement</p> <p>Average = 1: Bidder submits and meets 1 requirement only, with clear details outlining the requirement</p> <p>Unacceptable =0: The bidder does not meet any of the requirements specified above or has submitted something irrelevant</p>		
<p>3. Understanding of regional differences and highlighting nuances in the region</p> <p>Give insight into experience with regard to regional differences and highlighting nuances in the region.</p> <p>a. Africa: Consider cultural, economic, and infrastructural diversity.</p> <p>b. Europe: Account for distinct travel behaviours across regions.</p> <p>c. Asia: Handle vast, varied markets with precision.</p> <p>d. Americas: Consider East and West Coast differences.</p> <p>e. Domestic: Understanding of the differences of the SA market</p> <p>Bidders must have experience in all 5 regions.</p> <p>NON-SCORING</p> <ul style="list-style-type: none"> when a bidder does not cover all 5 regions specified above <p>This evaluation criteria will be evaluated in line with the functionality evaluation matrix below;</p> <p>Excellent = 3: Best-in-class outcomes deliver actionable insights across all five markets, meeting the following criteria:</p> <ol style="list-style-type: none"> Distinct: Clearly defined and unique segments. Measurable: Segments can be quantified and analyzed. Accessible: Segments are reachable through targeted marketing efforts. Tailored Strategies: Insights enable customized approaches for each segment. Effective Targeting: Strategies are designed to reach the right audience. Engagement: Approaches ensure meaningful interaction with each group. Business Growth: Insights contribute to measurable improvements in performance and outcomes. <p>NB: All the above 7 criteria must be fulfilled to achieve best-in-class results.</p> <p>Acceptable= 2 Acceptable outcomes deliver actionable insights across all five markets, meeting the following criteria:</p> <ol style="list-style-type: none"> Distinct: Clearly defined and unique segments. Measurable: Segments can be quantified and analyzed. Accessible: Segments are reachable through targeted marketing efforts. 	20	

Deliverables / Performance Indicators	Weight Allocated	Reference pages in the bidder's proposal.
<p>4. Tailored Strategies: Insights enable customized approaches for each segment. 5. Effective Targeting: Strategies are designed to reach the right audience. 6. Engagement: Approaches ensure meaningful interaction with each group. 7. Business Growth: Insights contribute to measurable improvements in performance and outcomes.</p> <p>NB: 5 to 6 criteria above must be fulfilled to achieve acceptable results.</p> <p>Average = 1: Average outcomes deliver actionable insights across all five markets, meeting the following criteria:</p> <ol style="list-style-type: none"> 1. Distinct: Clearly defined and unique segments. 2. Measurable: Segments can be quantified and analyzed. 3. Accessible: Segments are reachable through targeted marketing efforts. 4. Tailored Strategies: Insights enable customized approaches for each segment. 5. Effective Targeting: Strategies are designed to reach the right audience. 6. Engagement: Approaches ensure meaningful interaction with each group. 7. Business Growth: Insights contribute to measurable improvements in performance and outcomes. <p>NB: 3 to 4 criteria above must be fulfilled to achieve average result.</p>		
<p>4. Reporting (Assessment of the quality, clarity, and interactivity of reports and dashboards for data visualization and analysis.)</p> <ol style="list-style-type: none"> a. Delivery of standardized and segmented reports (market specific). b. Development of interactive Power BI dashboards for real-time visualization and filtering by market/segment. c. Customization and usability of the dashboard interface for SA Tourism needs. <p>This evaluation criteria will be evaluated in line with the functionality evaluation matrix below;</p> <p>Excellent = 3: Bidder submits and meets all 3 requirements, with clear details on each requirement Acceptable=2: Bidder submits and meets 2 requirements, with clear details outlining each requirement Average = 1: Bidder submits and meets 1 requirement only, with clear details outlining the requirement Unacceptable =0: The bidder does not meet any of the requirements specified above or has submitted something irrelevant</p>	20	
<p>5. Project Plan & Timelines - within a 10-month period per year (Evaluation of the proposed project plan, timelines, and how effectively the provider manages each phase of the study to ensure timely delivery.)</p> <ol style="list-style-type: none"> a. Fieldwork duration and scheduling. b. Detailed timeline for analytics and data processing phases c. Clear reporting schedule outlining milestone deliveries and final reporting. <p><u>NON-SCORING</u></p> <ol style="list-style-type: none"> a. Project plan timing that is more than 10 months <p>This evaluation criteria will be evaluated in line with the functionality evaluation matrix below;</p> <p>Excellent = 3: Bidder submits and meets all 3 requirements, with clear details outlining each requirement</p>	15	

Deliverables / Performance Indicators	Weight Allocated	Reference pages in the bidder's proposal.
Acceptable=2: Bidder submits and meets 2 requirements, with clear details outlining each requirement Average = 1: Bidder submits and meets 1 requirement only, with clear details outlining each requirement Unacceptable = 0: The bidder does not meet any of the requirements specified above or has submitted something irrelevant		
Total Weight	100	
The Minimum threshold required for bidders to pass this stage is 70%.		

- 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 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:

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.