



TENDER NO. TKZN 07/2016

TKZN'S OMNIBUS TRCKING SURVEY: 2017-2019

TOURISM KWAZULU-NATAL (TKZN) INVITES ALL PROSPECTIVE BIDDERS TO SUBMIT PROPOSALS FOR THE PROVISION OF TKZN'S OMNIBUS TRACKING SURVEY: 2017-2019

PROPOSALS SHOULD BE DEPOSITED AT THE TENDER BOX MARKED TENDER NO. TKZN 07/2016 SITUATED ON THE SECOND FLOOR, ITHALA TRADE CENTRE, 29 CANAL QUAY (SIGNAL) ROAD, POINT, DURBAN.

OR POSTED TO

**PROCUREMENT OFFICER
PO BOX 2516, DURBAN, 4000, SOUTH AFRICA**

NB: ENVELOPES MUST BE CLEARLY MARKED WITH THE TENDER NUMBER

CLOSING DATE: 28 NOVEMBER 2016, 12H00

NAME OF BIDDER.....

TOTAL PRICE (VAT INCLUSIVE).....



**2007 UNWTO Ulysses Award Recipient
UNWTO. Sbest Accredited DMO**

Zulu Kingdom. Exceptional

TERMS OF REFERENCE

TENDER NO.TKZN

07/2016

**TKZN'S OMNIBUS
TRACKING SURVEY:
2017-2019**

TABLE OF CONTENTS

- **TERMS OF REFERENCE**
- **INVITATION TO BID**
- **TAX CLEARANCE REQUIREMENT**
- **PRICING SCHEDULE**
- **DECLARATION OF INTEREST SBD4**
- **B-BBEE VERIFICATION CERTIFICATE**
- **DECLARATION OF BIDDER'S PAST SUPPLY
CHAIN MANAGEMENT PRACTICES**
- **CERTIFICATE OF INDEPENDENT BID
DETERMINATION**
- **GENERAL CONDITIONS OF CONTRACT**



Zulu Kingdom. Exceptional

TKZN'S OMNIBUS TRACKING SURVEY: 2017 – 2019

TERMS OF REFERENCE

1. INTRODUCTION

Tourism KwaZulu-Natal (TKZN) seeks proposals from interested, qualified, accredited research entities, with a proven track record in this area, to undertake the following tracking survey through the inclusion of the attached questions into a national syndicated or omnibus survey, capturing of the results, and production of a tabular report with access to the raw data. Copies of how this report is expected to be laid out will be provided, and the provision of electronic access tool for further interrogation of the data will be an added advantage.

TKZN run this survey for the past 12 years, through a number of research houses, in order to ascertain a number of critical, specific sets of information on tourism performance and behavior of tourists in the province, on perceptions of the province and of the health of the Zulu Kingdom brand. A full set of tender documents are available from the offices of TKZN, from the reception desk on the 2nd floor of Ithala Trade Centre, 29 Canal Quay (Signal) Road, Point, Durban.

2. OBJECTIVES

- 2.1 Ascertain the health of the Zulu Kingdom brand, travel patterns and provincial perceptions by South Africans overall, according to the sample;
- 2.2 Ascertain the brand health of the Zulu Kingdom brand, travel patterns and provincial perceptions by South Africans who travelled to or within KZN;
- 2.3 Ascertain recognition and associations of the destination's brand;
- 2.4 Ascertain liking or intention to visit/recommend the province;
- 2.5 Ascertain perceptions of the positioning statement used in the destination's brand; and
- 2.6 Test for general recognition of and perception about KZN as a domestic holiday, a conference or business destination.

3. METHODOLOGY AND SAMPLE DESIGN

- 3.1 This is a tracking survey that TKZN has been using for the past 12 years. It is thus **absolutely essential** that the methodology remain sufficiently similar for the results to be reliably comparable from a statistical perspective.
 - 3.1.1 Inclusion of a set of structured questions into a nationally syndicated survey of at least 2 500 urban adults proportionally stratified by population group.
- 3.2 The sampling framework needs thus to be as close as possible to that which has been used for the previous survey period of six years. This would include:

- 3.2.1 Personal, at home interviews in the home language or preferred language of the respondent;
- 3.2.2 At least 2 500 urban adults (over 18 years of age);
- 3.2.3 Should be an area-stratified probability one;
- 3.2.4 Fieldwork is to be done in summer, but out of the main holiday period ie at the end of January to mid-February;
- 3.2.5 Validation back-checks need to be done on at least 20% of the interviews;
- 3.2.6 All results to be post-weighted to estimated population proportions;
- 3.2.7 Analyses must be done in two sets – of all South African travellers, and also for all who came to KZN;
- 3.2.8 Analyses must be according to – race, monthly household income, age, home language, gender, province of origin, LSM groups and community size;
- 3.2.9 All tables must be laid out to include numbers, percentages and averages. A sample page layout can be supplied; and
- 3.2.10 There must be a summary table included, of how many people visited each sub-destination, based on all who visited KZN.

4. CONTRACT PERIOD

- 4.1 The agreement will be for a period of three (3) years subject to clause 7.8 below. It is essential that the proposal include a clear statement of cost per year as well as overall cost for the full period, size of sample, full explanation of the methodology, report format, and time frame from field to report delivery, as well as progress communications.

5. APPLICATION RULES

5.1 Late and Incomplete Applications

- 5.1.1 Any application reaching TKZN later than the date and time given in 5.3 below will not be considered. This also applies to incomplete applications.
- 5.1.2 An Executive Director or a Principal of the applicant shall sign all applications. Each such person shall be properly authorized to sign such documentation. Proof of such authorization shall be submitted when required.

5.2 Closing of Submissions

- 5.2.1 Applications must be clearly marked, the tender number, name and address of the applicant, and the closing date. The application must be placed in the tender box situated on the second floor of the Ithala Trade Centre Building, 29 Canal Quay (Signal) Road, Point, Durban, 4001 **before** the closing time.

5.3 The Closing Time and Date

Date : 28 November, 2016
Time : 12H00

Please note: No late proposals will be accepted.

6. FURTHER INFORMATION

- 6.1** TKZN reserves the right to seek further information from the applicants, as considered necessary.
- 6.2** TKZN reserves the right to accept or reject any bid in response to the advertisement and to withdraw its decision to seek provision of these services at any time.

7 EVALUATION CRITERIA

- 7.1** Proposals received will be evaluated by the panel on the basis of functionality as per the table below:
- 7.2** Tender applications need to meet the following basic functionality evaluation criteria, which will be considered and applied during the evaluation and adjudication process; the maximum weight of each criterion is indicated in the weight column:

7.2.1

CRITERIA	WEIGHT	VALUE	SCORE
Expertise, of both company and all relevant team members, in this field.	55	5	275
Methodology	30	5	150
Sampling framework	15	5	75

- 7.3** A bidder that scores less than 70% in respect of "functionality" will be regarded as submitting a non-responsive proposal and will be disqualified.
- 7.6** All qualifying proposals will thereafter be evaluated on the 90/10 preference point system for Requirements with a Rand value above R1 000 000.00 (all applicable taxes included); for the purposes of comparison and in order to ensure a meaningful evaluation using the formula below..

$$P_s = 90 \left(\frac{1 - \frac{P_t - P_{\min}}{P_{\min}}}{P_{\min}} \right)$$

7.7 POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTION

7.7.1 In terms of regulation 5 (2) of Preferential Procurement Regulations preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below.

B-BBEE Status Level of Contributor	Number of points
1	10
2	9
3	8
4	5
5	4
6	3
7	2
8	1
Non-compliant contributor	0

7.8 An appointment will be made in terms of the Tourism KwaZulu-Natal Supply Chain Management Policy.

PREPARED BY : _____ **DATE:** _____
Karen Kohler
Research Manager

APPROVED / NOT APPROVED : _____ **DATE:** _____
Phindile Makwakwa
Chief Operating Officer

**INVITATION TO BID
(SBD1)**

INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF TOURISM KWAZULU NATAL

TENDER NO: **TKZN 07/2016** CLOSING DATE: 28 NOVEMBER 2016 CLOSING TIME: **12:00**

DESCRIPTION: **PROVISION OF TKZN'S OMNIBUS TRACKING SURVEY: 2017-2019**

The successful bidder will be required to fill in and sign a written Contract Form (SB7)

BID DOCUMENTS MAY BE POSTED TO: PROCUREMENT OFFICER, PO BOX 2516, DURBAN, 4000, SOUTH AFRICA

OR

DEPOSITED IN THE BID BOX SITUATED AT: SECOND FLOOR, TOURISM KWAZULU NATAL, ITHALA TRADE CENTRE , 29 CANAL QUAY ROAD, DURBAN, 4000, SOUTH AFRICA

Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.

The bid box is generally open from 08h30 – 16h30 Monday to Friday.

ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS - PLUS THREE COPIES. =TOTAL (4 COPIES)

THE BID IS SUBJECT TO THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

**THE FOLLOWING PARTICULARS MUST BE FURNISHED
(Failure to do so may result in your bid being disqualified)**

NAME OF BIDDER
.....

POSTAL ADDRESS:
.....

STREET ADDRESS:
.....

TELEPHONE NUMBER: CODE NUMBER:

CELL PHONE NUMBER:
.....

FACSIMILE NUMBER:
.....

VAT REGISTRATION NO.:
.....

HAS A TAX CLEARANCE CERTIFICATE BEEN SUBMITTED (SBD 2)? YES NO

ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS/SERVICES OFFERED? *If "yes" enclose proof.*

YES

NO

SIGNATURE OF BIDDER:

.....

DATE:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

.....

TOTAL BID PRICE (VAT INCLUSIVE).....TOTAL NUMBER

**TAX CLEARANCE
REQUIREMENTS/CERTIFICATE
(SBD2)**

PRICING SCHEDULE
(SBD3.3)

PRICING SCHEDULE
(Services)

NAME OF BIDDER:	BID NO.: TKZN 07/2016
CLOSING TIME 12:00	CLOSING DATE: 28NOVEMBER 2016

OFFER TO BE VALID FOR 180 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY **(ALL APPLICABLE TAXES INCLUDED)
---------	-------------	--

1. The accompanying information must be used for the formulation of proposals.

2. NB: PLEASE REFER TO THE TERMS OF REFERENCE

Please ensure that a firm price is quoted inclusive of all the tender requirements

Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

R.....

3. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

.....	R.....	days
.....	R.....	days
.....	R.....	days
.....	R.....	days

4. Period required for commencement with project after acceptance of bid

.....

5. Estimated man-days for completion of project

.....

6. Are the rates quoted firm for the full period of contract?

*YES/NO

7. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

.....
.....
.....

*[TKZN 07/2016]

**DECLARATION OF
INTEREST
(SBD4)**

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
- the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
- 2.1 Full Name of bidder or his or her representative:
- 2.2 Identity Number:
- 2.3 Position occupied in the Company (director, trustee, shareholder²):
- 2.4 Company Registration Number:
- 2.5 Tax Reference Number:
- 2.6 VAT Registration Number:
- 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.
- ¹"State" means –
- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
 - (b) any municipality or municipal entity;
 - (c) provincial legislature;
 - (d) national Assembly or the national Council of provinces; or
 - (e) Parliament.
- ²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person connected to the bidder is employed :

Position occupied in the state institution:

Any other particulars:

.....
.....
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? **YES / NO**

2.7.2.1 If yes, did you attached proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? **YES / NO**

2.8.1 If so, furnish particulars:

.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? **YES / NO**

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH
23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE
FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

May 2011

**B-BBEE VERIFICATION
CERTIFICATES**

**DECLARATION
OF BIDDERS PAST
SUPPLY
CHAIN MANAGEMENT
PRACTICES (SBD8)**

DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
 - a. abused the institution's supply chain management system;
 - b. committed fraud or any other improper conduct in relation to such system; or
 - c. failed to perform on any previous contract.
- 4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector? (Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p>The Database of Restricted Suppliers now resides on the National Treasury's website (www.treasury.gov.za) and can be accessed by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)? The Register for Tender Defaulters can be accessed on the National Treasury's website (www.treasury.gov.za) by clicking on its link at the bottom of the home page.</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	<p>Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		
4.4	<p>Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>

4.4.1	If so, furnish particulars:
-------	-----------------------------

SBD 8

CERTIFICATION

**I, THE UNDERSIGNED (FULL NAME).....
CERTIFY THAT THE INFORMATION FURNISHED ON THIS DECLARATION
FORM IS TRUE AND CORRECT.**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT,
ACTION MAY BE TAKEN AGAINST ME SHOULD THIS DECLARATION
PROVE TO BE FALSE.**

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Js365bW

**CERTIFICATE OF
INDEPENDENT BID
DETERMINATION
(SBD9)**

CERTIFICATE OF INDEPENDENT BID DETERMINATION

SBD 9

- 1 This Standard Bidding Document (SBD) must form part of all bids¹ invited.
- 2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).² Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.
- 3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:
 - a. disregard the bid of any bidder if that bidder, or any of its directors have abused the Institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
 - b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.
- 4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.
- 5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

¹ Includes price quotations, advertised competitive bids, limited bids and proposals.

² Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.

CERTIFICATE OF INDEPENDENT BID DETERMINATION

I, the undersigned, in submitting the accompanying bid:

(Bid Number and Description)

in response to the invitation for the bid made by:

(Name of Institution)

do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: _____ that:
(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
 - (a) has been requested to submit a bid in response to this bid invitation;
 - (b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
 - (c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium³ will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
 - (a) prices;
 - (b) geographical area where product or service will be rendered (market allocation)
 - (c) methods, factors or formulas used to calculate prices;
 - (d) the intention or decision to submit or not to submit, a bid;
 - (e) the submission of a bid which does not meet the specifications and conditions of the bid; or
 - (f) bidding with the intention not to win the bid.
8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

³ Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....
Signature

.....
Date

.....
Position

.....
Name of Bidder

Js914w 2