



Zulu Kingdom. **Exceptional**

## TERMS OF REFERENCE:

### **APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT THE ANNUAL DOMESTIC TOURISM TRACKING SURVEY:2023**

#### 1. BACKGROUND

1.1. The KwaZulu-Natal Tourism Authority (TKZN) is established in terms of the KwaZulu-Natal Tourism Act of 1996, as amended Act No 2 of 2001. TKZN has been established to initiate, facilitate, coordinate and implement:

- Strategic Tourism Marketing;
- Demand driven Tourism Development programs, which will grow tourism, thereby striving to achieve the transformation of the tourism sector within the Province and;
- The provision of economic benefits to all stakeholders and the Province.

#### 2. PURPOSE OF THE TERMS OF REFERENCE (TOR)

The purpose of this TOR is to appoint a service provider from interested, qualified, accredited research entities, with a proven track record in this area to undertake a tracking survey through the use of a national syndicated, omnibus or online survey, capturing of the results and production of a tabular report with access to the raw data. Copies of the required structure of this report will be provided. The provision of electronic access tool for further interrogation of the data will be an added advantage.

TKZN has run this survey for the past 15 years, through several research houses, in order to ascertain a number of critical and specific sets of information indicative of domestic tourism performance and the behavior of these tourists in the province, based upon perceptions of the people and tourists of the province and of the perception and views of the health of the Zulu Kingdom brand.

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## **2. DELIVERABLES OF THE TRACKING SURVEY**

- 2.1. Ascertain the health of the Zulu Kingdom brand, travel patterns and provincial perceptions by South Africans based on a sample that is distributed evenly within South Africa.
- 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 awareness, 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.
- 2.7. Ascertain geographic spread by determining the percentage of visitors that visit 2 or more destinations in KZN per trip.
- 2.8. Ascertain the travel patterns of the South African domestic tourism market.

## **3. METHODOLOGY AND SAMPLE DESIGN**

- 3.1. This is a tracking survey that TKZN has been using for the past 15 years. It is therefore absolutely essential that the methodology remain sufficiently similar and constant for the results to be reliably comparable from a statistical perspective.
  - 3.1.1. A set of structured questions through a survey of at least 1 500 urban adults proportionally stratified by population group.
- 3.2. The sampling framework therefore needs to be as close as possible to that which has been used for the previous survey period of six years. This would include the following:
  - 3.2.1. Personal, at home interviews or online interviews/surveys in the home language or preferred language of the respondent;
  - 3.2.2. At least 1 500 urban adults (over 18 years of age);
  - 3.2.3. Should be an area-stratified probability sample;
  - 3.2.4. Fieldwork is to be done in the first 4 months of the year. ;
  - 3.2.5. Validation back-checks need to be done on at least 20% of the interviews;
  - 3.2.6. All results are to be post-weighted to estimated population proportions;

- 3.2.7. Analyses must be done in two sets – one of all South African (domestic) travelers, and the other is for all who visited KZN;
- 3.2.8. Analyses must be done 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 a display of numbers, percentages and averages. A sample page layout shall be supplied; and
- 3.2.10. There must be a summary table included indicative of how many people visited each sub-destination, based on the total of all who visited KZN.

#### **4. SERVICE STANDARDS AND QUALITY**

- 4.1. TKZN reserves the right to review as it deems appropriate the level of service received from the service provider.
- 4.2. The service provider must declare any interest it has in an assignment as well as declare any possible conflict of interest with TKZN in the pursuance of the proposed assignment.
- 4.3. Should any conflict of interest be discovered during the assignment, TKZN reserves the right to summarily cancel the agreement and demand that all information, documents and property of TKZN be returned.
- 4.4. The service provider will be required to sign a penalty-based SLA which will govern the deliverables, timelines and penalties.
  - 4.4.1 Any late submission of reports in accordance with section 5 (1 month) shall result in a deduction of 5% of the total fee;
  - 4.4.2 Any late submission of reports in accordance with section 5 (2 months) shall result in a deduction of 7.5% of the total fee;
  - 4.4.3 Any late submission of reports in accordance with section 5 (3 months and over) shall result in a deduction of 10% of the total fee.

#### **5. CONTRACT DURATION**

- 5.1. The duration of the contract is from the date of appointment of the service provider to the report being submitted by the last day of April 2023.

#### **6. BIDDER REQUIREMENTS**

- 6.1. Bidders must submit company profile which includes related company experience.

- 6.2. Bidders must provide proof of conceptual grasp indicating a clear understanding of various tasks to be performed in the successful completion of the project.
- 6.3. Bidders must demonstrate the ability of the individual/professional team to render the services and the expertise of key staff members by providing CVs of the support team.
- 6.4. Bidders must provide reference letters as proof of successful completion of similar projects in the last five (5) years from current/pervious clients.
- 6.5. Bidders must provide a project workplan detailing work program outlining deliverables and timelines of various workflow tasks required for this project.
- 6.6. Bidders must provide information on suggested methodology, which should include a suggested sampling framework and proposed tools that would be relevant.

## **7. SPECIAL CONDITIONS**

- 7.1. TKZN reserves the right to reject any proposal found to be inadequate or non-compliant to the Terms of Reference.
- 7.2. Bidders should demonstrate knowledge of TKZN's activities.
- 7.3. The successful bidder may be required to sign a Service Level Agreement (SLA) with the TKZN.
- 7.4. The successful bidder may not assign, in whole or in part, any of its obligations to perform in terms of the contract to any third party, unless the Chief Executive Officer has prior to the assignment, consented in writing to the assignment.
- 7.5. The successful bidder may not intend to cede its right to payment in terms of a contract to a third party without the prior written consent of the CEO. A bidder may not by means of cession, cede any of his obligations to perform in terms of a contract to any third party.
- 7.6. The bidder(s) must formally indicate any objection the bidder(s) may have in making available, on request by the TKZN all working papers, data, documents, reports and evidence collected or prepared during the planning, execution and reporting of the assignment.

## **8. RFQ REQUIREMENTS**

### **8.1. Standard bid documentation**

All bidders are required to complete the Standard Bid Documentation. Failure to do so may render the bid nonresponsive.

## 8.2. Technical proposal

The technical proposal should comprise the following elements:

- Understanding of the assignment and scope of work.
- Experience of the service provider including relevant track record, reputation, references letters on letterhead of clients, record of affiliation and experience of conducting similar work.
- Proposed team profile and other key members of the team.
- Detailed project execution plan, including task definition and allocation, project timeframes / timetable and milestones as well as feedback and reporting plan to TKZN.

## 8.3. Financial proposal

The financial offer must cover the following:

The bidder must provide a detailed breakdown of the financial implications, which should include but not be limited to:

- Creation of the sampling framework
- Data collection
- Data capturing
- Analyses and Report writing

Note 1 -TKZN reserves its right to negotiate the final fee/price.

Note 2 -Fees must be inclusive of VAT

## 9. APPLICATION RULES

### 9.1. Expenses incurred:

Neither Tourism KwaZulu-Natal nor any organ of state will be held liable for any expense incurred by the bidders.

### 9.2. Confidentiality:

The contents of the applications will be kept strictly confidential by the Authority and its advisors.

### 9.3. Number of Copies:

The RFQ responses shall be sent via email to the email address provided.

**9.4. Late and incomplete applications:**

Any application reaching the KwaZulu-Natal Tourism Authority later than the date and time provided will not be considered.

Bidders must provide all the information requested in the terms of reference.

**9.5. Closing of submissions:**

The closing date and time for submissions will be communicated.

**9.6. Information Contained in this document:**

The information/data provided in this document, together with any subsequent issue of addenda of information/data is given in good faith for the guidance of applicants. No warranties or representations are given regarding accuracy or completeness of such information.

**9.7. Further information**

The Tourism KwaZulu-Natal reserves the right to seek further information from the applicants, as it considers necessary.

**10. EVALUATION METHOD**

- 10.1. All proposals received will be evaluated by a panel on a basis of functionality and will then have their Bids scored for price and BBBEE Points.
- 10.2. Tender applications need to meet the functionality evaluation criteria, which will be considered and applied during the evaluation process.
- 10.3. For purposes of comparison and in order to ensure a meaningful evaluation, bidders are requested to furnish detailed information in substantiation of compliance to the evaluation criteria mentioned in paragraph 10.8.
- 10.4. A bidder that scores less than 70 points in respect of "functionality" will be regarded as submitting a non-responsive proposal and will therefore be disqualified.
- 10.5. Bidder that scores 70 points and above will be invited to conduct a presentation to the Bid Evaluation Committee and relevant specialists from within TKZN. The evaluation of the presentation is as below. A bidder will need 20 out of 25 points to be evaluated further for price and BBBEE.

10.6. Thereafter the 80/20 principle will apply in terms of the Preferential procurement policy framework act, 2000: Preferential procurement regulations, 2017. The goals for HDI are specified in the SBD 6.1 form.

10.7. An appointment will be made in terms of the procurement policy of the KwaZulu-Natal Tourism Authority.

10.8. It must be noted that in a case of a Joint Venture, the credentials of the lead company will be considered.

10.9. The evaluation criteria for functionality shall be as per the tables below:

Criteria for Evaluation	Maximum Score
<p><b>Company Experience:</b> Number of years' experience of the company in the implementation and successful completion of relevant studies. The projects must be accompanied by references.</p> <ul style="list-style-type: none"> <li>• 0 – 2 years experience – 5 points</li> <li>• 2 – 5 years experience – 10 points</li> <li>• 5 – 7 years r experience – 15 points</li> <li>• 7 – 10 years experience – 25 points</li> <li>• Over 10 years' experience – 30 points</li> </ul>	<b>30</b>
<p><b>Key Personnel</b></p> <p>Demonstrate ability of the bidder to render the service. This must be supported with a submission of CV of the project manager reflecting their applicable qualifications</p> <p>Research Qualification or equivalent of the Project Manager No NQF8 qualification – 0 points NQF8 qualification – 10 points Above NQF8 qualification – 20 points</p>	<b>20</b>
<p>Experience of the project manager team in conducting similar projects.</p> <p>Successful completion of similar projects No similar project – 0 point 1 similar project – 5 points 2 similar projects – 10 points 3 similar projects – 15 points 5 similar projects – 20 points</p>	<b>20</b>
<p><b>Methodology</b> The quality and reasonableness of the project work plan will be</p>	<b>30</b>

assessed / evaluated and therefore a detailed work program outlining the various workflow items/tasks required for this project must be submitted. The tools that would be utilized for the project explaining the relevance and advantages of such tools.	
Adequate program i.e., work items shown – 5 points Good program i.e., all necessary work items shown – 10 points Very good program i.e., all necessary and major work items shown – 20 points Excellent program i.e., all necessary work items shown, including links between tasks and additional information – 30 points	
<b>Total Score</b>	<b>100</b>

### Evaluation Criteria for Presentation

	Total Score	Providers Score
<b>Proposed Plan</b>	10	
<b>Methodology</b>	15	
<b>Total Score</b>	<b>25</b>	

## 11. PRICING AND SCORING

- 11.1. This process will only be relevant/applicable to bidders short-listed during phase 1 of the tender evaluation process, meaning bidders who achieved a minimum of 70 points for functionality, will proceed to the presentation phase of the process.
- 11.2. Bidders who achieve a minimum of 20 points at the presentation phase will be evaluated further for price and BBBEE.
- 11.3. All qualifying proposals will thereafter be evaluated on the 80/20-preference point system.
- 11.4. Where price score will be 80 points for requirements with a Rand value equal to or above R 30, 000 and up to a Rand Value of R50 million inclusive of all applicable taxes.
- 11.5. The following formula will be used to calculate the points out of 80 for price.

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

- Ps = Points scored for price of tender under consideration;  
Pt = Price of tender under consideration; and  
Pmin = Price of lowest acceptable tender.



11.6. The following table must be used to calculate the score out of 20 for BBEE:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- 11.7. An appointment will be made in terms of the SCM policy of the KwaZulu-Natal Tourism Authority.
- 11.8. Bidders who qualify as EMEs in terms of the B-BBEE Act must submit a certificate issued by an Accounting Officer as contemplated in the CCA or a Verification Agency accredited by SANAS or a Registered Auditor. Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates.
- 11.9. Bidders other than EMEs must submit their original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a Registered Auditor approved by IRBA or a Verification Agency accredited by SANAS.
- 11.10. A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.
- 11.11. A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.
- 11.12. A person will not be awarded points for B-BBEE status level if it is indicated in the bid documents that such a bidder intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a bidder

qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.

- 11.13. Person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

## **12. INTELLECTUAL PROPERTY RIGHTS**

12.1. It must be noted that KwaZulu-Natal Tourism Authority will have unlimited access to all documents and processes applied by the successful bidder during and after the completion of the project at hand.

12.2. An appointment will be made in terms of the SCM policy of Tourism KwaZulu-Natal.

12.3. Please note: No proposals will be accepted after the closing time.

## **13. INTELLECTUAL PROPERTY RIGHTS INDEMNITY**

13.1. The Bidder undertakes to obtain the necessary consent proprietors or their licenses should the Bidder make use of the intellectual property of any other person.

13.2. The Bidder hereby indemnifies Tourism KwaZulu-Natal against any action, claim, damage or legal cost that may be instituted against Tourism KwaZulu-Natal on the ground of an alleged infringement of any copyright or other intellectual property right in connection with the work outlined with this bid.

13.3. The Bidder further indemnifies Tourism KwaZulu-Natal against any claim or action (including costs) caused by and/or arising from the failure to obtain such consent.

13.4. All original drawings and documents received from Tourism KwaZulu-Natal together with all other drawings, including photographic reductions and negatives thereof, computer programs and other data prepared by the Bidder in connection with the work with prior approval and at the expense of Tourism KwaZulu-Natal, shall be lodged together with any software and/or intellectual property rights in relation thereto with Tourism KwaZulu-Natal and become the property of Tourism KwaZulu-Natal. Bidder shall not make any of the data, details, drawings or information available to any third party, for whatever reason, without prior written approval of Tourism KwaZulu-Natal and shall take the necessary steps to safeguard against this happening.

13.5. Copyright of all documents prepared by the Bidder in terms of this bid shall be owned by TKZN and TKZN shall have unlimited access and free use of the material as and when required.

**14. INFORMATION TO BE SUBMITTED BY APPLICANTS**

**14.1. The submission shall be compiled as follows:**

- Bid Proposal
- SBD 4, 6.1, 8 and 9 (failure to submit correctly completed SBD’s may result in disqualification)
- Examples of projects of this nature.
- Approach and Methodology
- CVs of Project Manager and Project Team
- Pricing Schedule **per Annexure A**
- Original Certified BEE Certificate or Affidavit
- CSD Report
- SARS PIN

**15. NON-APPOINTMENT**

TKZN reserves its rights either NOT to make an appointment and/or appoint the bidder with the lowest price. TKZN also reserves its right to negotiate the final price of those bids deemed technical compliant.

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<p><b>APPROVED / NOT APPROVED</b> :</p> <p>Approved</p>	 <small>Acting GM: TIS   c7ede979-302b-4926-b663-0cc24a95d701</small> ----- <p><b>Anir Bidesi</b>  <b>Acting GM Tourism Information Services</b></p>	<p style="text-align: right;"><small>01/03/2023 01:50:12 PM</small></p> <p><b>DATE:</b> -----</p>

**PRICING SCHEDULE**

**Annexure A**

<b>Activity</b>	<b>Amount (R)</b>
Creation of the sampling framework	
Data collection	
Data capturing	
Analyses and Report writing	
Other	
<b>Total (Incl. VAT)</b>	

## DOCUMENT SUBMISSION CHECKLIST FOR TKZN

DETAILS	YES	NO
COMPANY PROFILE		
APPROACH AND METHODOLOGY		
COMPANY EXPERIENCE		
CV OF PROJECT MANAGER		
CV OF TEAM MEMBERS		
SARS PIN ON SARS LETTERHEAD		
PRICING SCHEDULE ON COMPANY LETTERHEAD – Annexure A		
SBD 4		
SBD 6.1		
ORIGINAL CERTIFIED BBBEE CERTIFICATE OR AFFIDAVIT		
SBD 8		
SBD 9		
CSD REPORT		

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