



Zulu Kingdom. **Exceptional**

TERMS OF REFERENCE FOR THE APPOINTMENT OF A PROFESSIONAL SERVICE PROVIDER FOR THE DEVELOPMENT OF A TOURISM DEVELOPMENT PLAN AT NTABAMHLOPE UNDER THE INKOSI LANGALIBALELE LOCAL MUNICIPALITY

1. BACKGROUND

- 1.1 Tourism is widely recognised as one of the most important sectors to drive growth and promote economic development, particularly in rural areas. Accordingly, tourism is specifically seen as a tool to promote economic development, job creation and alleviate poverty as an alternative to other traditional economic sectors such as agriculture, mining and manufacturing.
- 1.2 The study is aimed at investigating tourism development opportunities in the rural community of Ntabamhlophe and Inkosi Langalibalele Local Municipality to pursue integrated and sustainable tourism development projects and programmes area to ignite economic activity.

2. OBJECTIVES

- 2.1 To appoint a professional and reputable service provider for the development of a Tourism Development Plan to identify and assess the viability of tourism development opportunities at Ntabamhlophe under Inkosi Langalibalele Local Municipality.

3. SCOPE OF WORK

- 3.1 The successful service provider will identify and assess the viability of tourism development opportunities at Ntabamhlophe under Inkosi Langalibalele Local Municipality and formulate a Tourism Development Plan. The scope of works shall be broken down as follows:
 - a. To undertake research to assess the tourism potential of Ntabamhlophe in line with the local and district tourism development plans and strategy.
 - b. Undertake a detailed analysis of tourism demand and supply factors for the area and investigate potential linkages to establish destinations.
 - c. To conduct a SWOT, PESTLE and Gap analysis and to formulate conclusions and recommendations for product development, product diversification, marketing strategy and land analysis in order to unleash the tourism potential of the area.
 - d. To identify potential tourism activities that are feasible and practical which could be packaged for the development of Ntabamhlophe as a tourist destination.

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3.2 The main study outputs will be the following:

- a. Inception Report: detailing the scope of work and the methodology that will be used to develop tourism viability and potential for the area. This should include the practical methodology to be used, project approach and realistic timeframes. The inception report shall be presented within 14 days of appointment letter issued.
- b. Situational Analysis and Feasibility Study: informed by intense research and detailing the status quo of the tourism sector and the existing state of infrastructure within the area of study. Comprising of a detailed SWOT Analysis, PESTLE Analysis, Gap Analysis, Product Analysis and Market Analysis of the area of study with more emphasis on the recommendations regarding the refurbishment of appropriate tourism products, standards, range and type of tourism facilities.
- c. Tourism Development Plan and Implementation Plan: undertake a tourism development plan providing key elements of business opportunities within the area of study. The Development Plan shall also direct areas that could easily unlock and complement the existing tourism related opportunities within the area. The development plan is also expected to briefly outline rural and township-based projects and programmes for tourism development and the implementation plan.
- d. Close out Report: a comprehensive Tourism Development Plan including all its elements and detailing the necessary information including schedule of payments, expenditure, signed copies of all steering committee minutes, challenges faced during the project, recommendations to the department to improve on similar projects in future.

4. SKILLS AND COMPETENCIES

The interested professional service provider must possess, amongst its team members, and demonstrate the following set of skills, competences and experiences.

Competencies	Description
<p><u>Key Expert 1: Team Leader</u></p> <ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • Officially recognised degree in either Tourism Management, Development Studies, Town and Regional Planning or equivalent of these. • 5 to 10 years' experience in Tourism Planning and Development. • 3 to 5 years of experience in developing Tourism Plans and Strategies, Spatial Development Frameworks. • Good knowledge of regional planning including town and township & rural development. • Broad knowledge of transformation in the tourism industry. • Good knowledge and experience in investment promotion. • Applied knowledge of the provincial growth strategy and provincial spatial economic development strategy.

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	<ul style="list-style-type: none"> • Good understanding of domestic and international market. • Sound knowledge and experience in financial management. • Sound knowledge of the various funding institutions and their funding criteria for tourism projects. • Good knowledge and insight in tourism development.
<p><u>Key Expert 2: Tourism Planner</u></p> <ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • Officially recognised degree in Tourism Management, Development Studies, Town and Regional Planning or equivalent of these. • 2 to 5 years' experience in Tourism Planning and Development. • 1 to 3 years of experience in developing Tourism Plans and Strategies, Spatial Development Frameworks. • Good knowledge of regional planning including town and township & rural development. • Broad knowledge of transformation in the tourism industry. • Good knowledge and experience in investment promotion. • Applied knowledge of the provincial growth strategy and provincial spatial economic development strategy. • Good understanding of domestic and international market. • Sound knowledge and experience in financial management. • Good knowledge and insight in tourism development.
<p><u>Key Expert 3: Sector Specialist</u></p>	<ul style="list-style-type: none"> • Officially recognised degree in either Tourism Development, Tourism Management, Destination Management or equivalent of these. • 2 to 5 years' experience in Tourism Planning and Development. • 1 to 3 years of experience in developing Tourism Plans and Strategies, Spatial Development Frameworks. • Good knowledge of national, provincial and local tourism policy, legislation, strategies and plans. • Broad knowledge of transformation, gazetted tourism sector codes and B-BBEE Act. • Good knowledge and experience of Responsible Tourism and Community-Based Tourism development. • Applied knowledge of the provincial growth strategy and provincial spatial economic development strategy. • Good understanding of domestic and international markets. • Sound knowledge and experience in financial management.

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5. CONTRACT PERIOD

The contract will be for a period of up to four (4) months.

6. QUOTATION REQUIREMENT

6.1 Standard documentation

All bidders are required to complete the Standard Bid Documents attached.

6.2 Technical proposal

The technical proposal should comprise the following elements:

6.2.1 Understanding of the assignment and scope of work.

6.2.2 Experience of the service provider including relevant track record, reputation, references letters on letterhead of clients, and experience of conducting similar work.

6.2.3 Proposed project team profile and other key members of the team.

6.2.4 Detailed project execution plan, including task definition and allocation, project timeframes / timetable and milestones as well as feedback and reporting plan to TKZN.

6.3 Financial proposal

The budget breakdown will include a cost estimate for the contract period of 4 months, which must include the following:

6.3.1 Related assumptions and itemised budget.

6.3.2 Fees must be quoted at an all-inclusive rate for the different levels of proposed resources to be utilized; and

6.3.3 Fees must indicate if they are inclusive of VAT or not.

6.3.4 All administration cost such as accommodation, travel, subsistence, etc. for the duration of the project.

6.3.5 To show the total cost per deliverable.

6.3.6 To give final totals.

7. EVALUATION CRITERIA

7.1 All bids will be assessed in terms of functionality (quality), price and B-BBEE. In order to be deemed technically compliant bidders must achieved a minimum score of 60% on the functionality points available as per the Evaluation Grid on 9.3 below.

7.2 Those bidder/s who are deemed to be technically compliant will thereafter be assessed in terms of price and preference points on a 80/20 preference points system. Financial proposals will also be assessed in terms of reasonableness of costs in relation to prevailing fee guidelines, consistency with the technical bid submitted and value for money.

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7.3 The evaluation criteria for functionality shall be as per the table below:

Criteria	Requirements from service providers	Weighting
Company competency and capacity	<p>Company's cumulative years' experience in feasibility studies, business planning, and Project Management. Attach relevant references of current and previous work done. The reference letters should include project type, budget, duration, role played in the project and contact details of referees.</p> <ul style="list-style-type: none"> • Below 1 year experience in doing work in line with the required scope of works- 5 • 1 to 2 years' experience in doing work in line with the required scope of works-- 10 • 3 to 4 years' experience in doing work in line with the required scope- 15 • 5 to 6 years' experience in doing work in line with the required scope of works-- 20 • 7 to 10 years' experience in doing work in line with the required scope of works-- 25 • Above 10 years' experience in doing work in line with the required scope of works-- 30 	30
Project team competency	<p>Collective experience and expertise of personnel proposed on project (copies of CV and certificates of personnel who will be responsible for the project must be included).</p> <ul style="list-style-type: none"> • Below 1 year experience in doing work in line with the required scope of works-- 5 • 1 to 2 years' experience in doing work in line with the required scope of works--- 10 • 3 to 4 years' experience in doing work in line with the required scope of works-- 15 • 5 to 6 years' experience in doing work in line with the required scope of works-- 20 • 7 to 10 years' experience in doing work in line with the required scope of works-- 25 • Above 10 years' experience in doing work in line with the required scope of works-- 30 	30
Approach methodology	<p>Proposal should clearly show how the service provider will achieve on the formulation of the Tourism Development Plan and how to develop the tourism viability and potential for the area regarding to the practical methodology to be used, project approach and realistic timeframes.</p> <ul style="list-style-type: none"> • No proposal/ proposal reflects poor understanding of the terms of reference - 0 • Proposal shows understanding of terms of reference but not clear on how results will be achieved on the proposed constructs – 10 • Proposal displays clear understanding of the terms of reference, clear on how results will be achieved but does not provide sufficient proof of ability to achieve these (past successes, letters of intent, etc.) - 20 	30

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	<ul style="list-style-type: none"> Proposal displays clear understanding of the terms of reference, clear on how results will be achieved on the constructs and provides sufficient proof of ability to achieve these - 30 	
Value-adding initiatives	<p>Service providers are to include any value-adding initiatives/ recommendations in respect of achieving enhanced results in the provision of enterprise development services.</p> <ul style="list-style-type: none"> No Value adding initiatives – 0 Value adding initiatives submitted however no clear on built environment and tourism product development and operations - 5 Value adding initiatives submitted and clear on built environment and tourism product development and operations. – 10 	10
Total		100

8. PRICE SCORING

8.1 This process will only be relevant/applicable to entities that have scored more than 60% for functionality for the tender evaluation process, meaning entities who achieved >60% and higher.

8.2 All qualifying proposals will thereafter be evaluated on the 80/20 preference point system where price will be (80) system 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.

8.3 The following formula will be used to calculate the points out of 80 for price.

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

P_s = Points scored for price of tender under consideration;

P_t = Price of tender under consideration; and

P_{min} = Price of lowest acceptable tender.

8.4 The following table must be used to calculate the score out of 20 for BBBEE:

B-BBEE Contributor	Status Level of	Number of points (80/20 system)
	1	20
	2	18
	3	14

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4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

- 8.5 An appointment will be made in terms of SCM policy of the KwaZulu-Natal Tourism Authority.
- 8.6 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.
- 8.7 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.
- 8.8 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.
- 8.9 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.

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8.10 Tertiary institutions and public entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

8.11 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.

8.12 A 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.

9. CONFIDENTIALITY OF THIS INFORMATION

9.1 All the information contained in this document must be considered as confidential.

10. NON-APPOINTMENT

10.1 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 technically compliant. For Technical Enquiries Contact: Abie Wentzel via email abie@zulu.org.za

11. APPLICATION RULES

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

11.2 Confidentiality:
The contents of the quotation will be kept strictly confidential by the Authority and its advisors.

11.3 Late and incomplete applications:
Any quotations reaching the KwaZulu-Natal Tourism Authority later than the date and time given on 13.4 below will not be considered. Service providers must provide all the information requested in the terms of reference.

11.4 Closing of submissions:
Quotation must be submitted via e-mailed to quotes@zulu.org.za

11.5 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

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warranties or representations are given regarding accuracy or completeness of such information.

11.6 Joint Venture

Where suppliers are unable to provide all services, it shall be permissible to undertake joint ventures with suitably qualified service providers. In such case all parties will be jointly and severable liable as a single entity in fulfilling the required services. Details of joint ventures must be clearly referenced.

11.7 Further information

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

12. INFORMATION TO BE SUBMITTED BY APPLICANTS

- 12.1 Quotation Document
- 12.2 Pricing
- 12.3 Sub-Contracting details
- 12.4 Company Profile
- 12.5 Completed SBD Documents (SBD 4, 6.1, 8 and 9)
- 12.6 Certified Copy of BBBEE Certificate or Affidavit
- 12.7 CSD MAA number
- 12.8 SARS Pin Document

13. INTELLECTUAL PROPERTY RIGHTS

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

13.2 An appointment will be made in terms of the procurement policy of Tourism KwaZulu-Natal. **Please note: No proposals will be accepted after the closing time.**

PREPARED BY:

Abie Wentzel

Project Manager: Tourism Development


Project Manager | 562a5424-d576-4c92-b264-f58ca26fb7e6

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DATE: -----

APPROVED/

NOT APPROVED

Samora Nqweniso

Acting General Manager: Tourism Development

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Acting GM: TD
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