



Zulu Kingdom. **Exceptional**

TERMS OF REFERENCE:

BUSINESS EVENTS – NOT JUST THE ECONOMICS

APPOINTMENT OF A SERVICE PROVIDER TO MEASURE THE SOCIAL IMPACT OF BUSINESS TOURISM FOR THE PROVINCE OF KWAZULU-NATAL

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 (MICE Meetings, Incentives, Conferences and Exhibitions) within the Province and;
- The provision of economic benefits to all stakeholders and the Province.

The KwaZulu-Natal Convention Bureau is a body dedicated to promoting and marketing the regions' many business events facilities, capabilities, and assets, both nationally and internationally.

The Convention Bureau provides Pre and Post bid assistance, Congress/convention planning support, engagements with key stakeholders, bid presentation assistance, site inspections and educational trips, pre and post tours and social events, delegate boosting among other services.

Legacy can be defined as a long-lasting impact of an event that has taken place. Studies in the Business Events sector have primarily focused on the legacy of the spending patterns, the economic benefit that a conference/congress has had on a destination.

KZN has hosted some significant congresses in the past and will do so in the future, TKZN would like to measure the impact of these congresses beyond the economics.

2. PURPOSE OF THE TERMS OF REFERENCE (TOR)

2.1. 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 research:

To track the transfer of knowledge and capacity building of conferences/congresses through:

- The tracking of adopted resolutions taken at conferences by relevant stakeholders in the destination
- The impact of the MICE sector on the policy of relevant stakeholders in the destination
- The impact of the MICE on the actions of relevant stakeholders in the destination, i.e. the impact of community projects, impacts on teaching and learning, adoption of new techniques/methods etc.
- The impact of MICE events on the sustaining/creation of jobs
- The economic impact of MICE Events, from a demand and supply-side perspective

3. Scope of Work

The Impact Assessment is divided into the following functional areas:

- 3.1.1 Planning Phase-** Development of a proposal illustrating the aim, objectives, desktop research and data collection methods and sampling techniques, deliverables and timelines.
- 3.1.2 Data Collection and Analysis-** Collation of both primary and secondary data for analysis. This includes interviews.
- 3.1.3 Meetings-** Regular meetings attendance as and when required.
- 3.1.4 Reporting and Presentation-** Furthermore, presentation of preliminary and final results.

4. DELIVERABLES

4.1. The successful service provider shall be expected to deliver the following:

The study would need to:

- Create a database of MICE events that took place in KZN in the previous 5 (five) years to use for the study.
- Identify, if any, the resolutions, relating to the implementation of legacy projects that have been adopted at conferences/ meetings. Establishing contact with various bodies in the sector, such as SAACI, CTO's, SITE, PCO's, EXXO, would be required.

- Determine if these resolutions have been carried out, how, when and their progress.
- The adoption and implementation of new ideas/methods exposed to at conferences/meetings i.e. the impact of new knowledge gained as a result of the conference/meeting.
- Any pitfalls encountered in the adoption/implementation/taking on board new information/methods.

5. PROGRESS REPORTING

- 5.1.1 Provide regular progress reports to ensure that monitoring of performance and progress in terms of data collection and analysis phases.
- 5.1.2 Summary of activities undertaken and the process in meeting deliverable/s;
- 5.1.3 Deliverable for month to be attached to the report;
- 5.1.4 Deliverable achieved since last report;
- 5.1.5 Project financial status;
- 5.1.6 Issues and risk that may affect timescales or deliverables.

6. KNOWLEDGE, QUALIFICATIONS AND EXPERIENCE

- 6.1. The service provider must provide TKZN with a Lead Researcher/Project Manager who has obtained the following qualification and experience:
 - a. Minimum of a honours degree in any related field of Tourism, Social Science, Management Sciences, Economics, Statistics, Marketing.
 - b. Minimum of a least five completed impact studies in any of related fields Tourism, Social Science, Management Sciences, Economics.
 - c. Program Monitoring and Evaluation
 - d. Excellent communication and report writing skills.

7. SERVICE STANDARDS AND QUALITY

- 7.1. TKZN reserves the right to review as it deems appropriate the level of service received from the service provider.
- 7.2. 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.

- 7.3. 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.

8. CONTRACT DURATION

- 8.1. The duration of the contract will be 60 days from the date of appointment.

9. BIDDER REQUIREMENTS

- 9.1. Bidders must submit a company profile which includes related company experience.
- 9.2. Bidders must provide proof of conceptual grasp indicating a clear understanding of various tasks to be performed in the successful completion of the project.
- 9.3. 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.
- 9.4. Bidders must provide reference letters as proof of successful completion of similar projects in the last five (5) years from current/pervious clients.
- 9.5. Bidders must provide a project workplan detailing work program outlining deliverables and timelines of various workflow tasks required for this project.
- 9.6. Bidders must provide information on suggested methodology, which should include a suggested sampling framework and proposed tools that would be relevant.

10. SPECIAL CONDITIONS

- 10.1. TKZN reserves the right to reject any proposal found to be inadequate or non-compliant to the Terms of Reference.
- 10.2. Bidders should demonstrate knowledge of TKZN's activities.
- 10.3. The successful bidder may be required to sign a Service Level Agreement (SLA) with the TKZN.
- 10.4. 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.

- 10.5. 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.
- 10.6. 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.

11. RFQ REQUIREMENTS

11.1. Standard bid documentation

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

11.2. 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.

11.3. 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:

- Budget breakdown as per the project plan.
- Fees must be inclusive of VAT

11.4. 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.

11.5. Further information

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

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.

12. EVALUATION METHOD

Selection will be conducted over three stages as detailed below:

- 10.1. Stage 1 - Compliance with Administrative Compliance
- 10.2. Stage 2 - Functionality
- 10.3. Stage 3 - Price and Specific Goals

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

Criteria for Evaluation	Maximum Score
<p>COMPANY COMPETENCY AND CAPACITY</p> <p>Company Experience: Bidders must submit a company profile which includes company experience in the implementation and successful completion of relevant and applicable work.</p> <ul style="list-style-type: none"> • 0 – 5 years’ experience – 5 points • 6 – 10 years’ experience – 10 points • Over 10 years’ experience – 15 points 	15
<p>COMPANY COMPETENCY AND CAPACITY- 30 POINTS</p> <p>To score points bidders must submit positive reference letters of current and previous work done,</p> <p>NB: The reference letter must have a:</p> <ul style="list-style-type: none"> • Full description of the project / Project Type • Name of the Client and their representative contract details • Role played in the project. 	20
Six (6) or more positive reference from contactable clients = 20 points	
Five (5) positive reference from contactable clients = 10 points	
Three (3) more positive reference from contactable clients = 5 points	
Less than three or No positive reference letter = 0 points	
<p>Key Team Personnel</p> <p>Research Expertise of Project Manager/Lead Researcher</p> <p>Demonstrate technical as well as professional skills and ability of the Research Manager to render the service. This must be supported</p>	20

<p>with a submission of CV of the project manager reflecting their applicable qualifications and experience.</p> <p>Research Qualification or equivalent of the Project Manager/Lead Researcher</p> <p>a) Masters degree in Tourism, Social Science, Management Sciences, Economics, Statistics, Marketing or equivalent certification in the subject areas listed in 6.3 /NQF9 qualification = 20 points</p> <p>b) Honours in Tourism, Social Science, Management Sciences, Economics, Statistics, Marketing or equivalent certification in the subject areas listed in 6.3 QF8 qualification = 10 points</p> <p>c) No Honours degree or equivalent certification in the subject areas listed in 6.3 NQF8 qualification =0 points</p>	
<p>Research Expertise of Lead Researcher Manager</p> <p>Years of relevant experience in conducting Tourism research.</p> <p>a) 9 years and more experience = 15 points</p> <p>b) 7-8 years' experience = 10 points</p> <p>c) 5-6 years' experience = 5 points</p> <p>d) Less than five years' experience = 0 point</p>	15
<p>Research Expertise of Second Researcher in Charge</p> <p>Demonstrate technical as well as professional skills and ability of the Second Researcher to render the service. This must be supported with a submission of CV of the project manager reflecting their applicable qualifications and experience.</p> <p>a) 9 years and more experience = 10 points</p> <p>b) 7-8 years' experience = 5 points</p> <p>c) 5-6 years' experience = 3 points</p> <p>d) Less than five years' experience = 0 points</p>	10
<p>The proposal should clearly show how the service provider will conduct the detailed market assessment, design development and comprehensive business planning regarding the practical methodology to be used.</p> <ul style="list-style-type: none"> • Clear approach that demonstrates the understanding of the project objectives • Detailed outlining of tasks • Clear and realistic timelines, project tracking and 	20

<p>communication tools (project timeline with milestone</p> <ul style="list-style-type: none"> • Coherence in the overall project and implementation. • Provide a stakeholder mapping. <ul style="list-style-type: none"> • Proposal shows 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 points • Proposal shows understanding of terms of reference but not clear on how results will be achieved on the proposed constructs = 10 points <p>No proposal/ proposal reflects poor understanding of the terms of reference = 0 point</p>	
Total Score	100
<p>Minimum qualifying score: A bidder scoring below 70 points in quality will be considered as disqualified for evaluation and will be discarded from any further evaluation.</p>	

11. STAGE 3- PRICE AND SPECIFIC GOALS

Bidders who obtained a minimum qualifying score of 70% will qualify to be evaluated on price and preferential points evaluation will be applied as follows:

- Proposals will be subject to an evaluation based on an 80/20 - 80 points for price and 20 points for specific goals.

- Fixed price is required; price must be inclusive of VAT and all costs relating to disbursements and accommodation.

The following table will be used to calculate the Price and Specific Goals

			POINTS
PRICE			80
Specific GOALS	51% or more Black Ownership	5	20
	51% or more Black Women Ownership	10	
	The promotion of enterprises located in KwaZulu-Natal	3	
	The promotion of enterprises located in South Africa	2	
Total points for Price and SPECIFIC GOALS			100

The following may be used as proof for claiming preference points:

- BBBEE Affidavit
- BBBEE Certificate
- CIPC
- CSD Full Registration Report
- SA ID document
- **For location: A stamped letter from the local councillor or municipal utility bill or Lease Agreement**

PRICING SCHEDULE

Annexure A

Activity	Amount (R)
Creation of the sampling framework	
Data collection	

Data capturing	
Analyses and Report writing	
Other	
Sub-total	
VAT (applicable taxes)	
Total (Incl. VAT)	


 Acting Manager: Research | d42aef14-0637-46e2-b521-ec1e231e87ff
PREPARED BY : ----- **DATE:** -----
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Acting Research Manager

23/01/2024 09:45:40 AM


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APPROVED /
NOT APPROVED : ----- **DATE:** -----
Anir Bidesi
Acting GM Tourism Information Services

23/01/2024 09:51:29 AM

DOCUMENT SUBMISSION CHECKLIST FOR TKZN– DOMESTIC STANDS

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		
