



enterprise ilembe
ECONOMIC DEVELOPMENT AGENCY

TERMS OF REFERENCE

FOR

THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT TOURISM INDUSTRY RESEARCH WITHIN THE ILEMBE DISTRICT

Closing Date: 24 July 2018

Closing Time: 11h00

Venue: Sangweni Tourism Centre, Ballito

It is the intention of Enterprise iLembe to enter into a formal contract with a Service provider or consortium to provide the services described herein. These Terms of Reference and the consultant's proposal will form the basis of the Contract.

Section 1: Details

Municipality:	iLembe District Municipality and the local municipalities comprising of KwaDukuza, Mandeni, Maphumulo & Ndwedwe
Contracting Agency:	Enterprise iLembe Economic Development Agency
Project Name:	Tourism Industry Research

Section 2: Summary of Brief

Proposals are being requested from suitably qualified and experienced service providers to conduct Tourism Industry Research within the iLembe District, the aim of which is to measure against the baseline and market performance as well as to quantify the economic impact of the tourism industry in the district.

Section 3: Project Description

Introduction:

The iLembe District Municipality

The iLembe District Municipality is situated on the east coast of South Africa, in the KwaZulu-Natal Province. iLembe is one of the 11 district municipalities of KwaZulu-Natal province in South Africa and also the smallest District Municipality in the province, with a total population of just over 650000. iLembe is located between two of Africa's busiest ports, Durban and Richards Bay, iLembe is therefore well situated not only to local but also international markets. Despite its strategic location, iLembe faces numerous economic challenges such as the high levels of poverty in the rural inland areas, which contrasts with rapid development along its coastal regions.

Enterprise iLembe:

Enterprise iLembe is an economic development agency wholly-owned by the iLembe District Municipality mandated to pursue and facilitate investment, economic development and empowerment in iLembe. The objective of Enterprise iLembe is to improve the competitiveness of the iLembe Region by creating an environment that will enable local business to compete successfully on the international stage.

The key sector areas are:

- Agriculture
- Tourism
- Manufacturing
- Services

Objectives:

The main objective of this project is to conduct tourism statistics in order to measure the performance of the tourism industry within the iLembe region which will assist with planning and decision making at a district level.

Section 4: Specifications

The service provider will be expected to perform the following key activities (but not limited to):

- Collection and collation of secondary data sources (most recent as well as a population of historical data) including:
 - Statistic short-term indicators (e.g. accommodation indicators, income per night, occupancy levels)
 - Reports by Tourism KZN, SA Tourism & Stats SA
- Compilation of primary tourism data:
 - Identification and networking with relevant local and provincial stakeholders for the inclusion in tourism data reporting
 - Assessment of current local and district data collection strategies
 - Direct Tourism Surveys
 - Monthly Accommodation Surveys
 - Direct Visitor Intercept Surveys
 - Economic Impact of Tourism: Contribution of tourism to iLembe GDP (direct and indirect spend)
 - Employment Opportunities generated from Tourism
 - Identification/ development of relevant information collection tools and schedules:
 - Harmonisation of data compatibility and comparability
 - Pilot and administer system of data flows and collection.

- Package the project information to compile bi-annual and annual District Tourism Statistics reports. In addition to the statistical information, the report must include a comprehensive report on the analysis of relevant tourism trends.
A clear methodology needs to be presented as part of the proposal.

Section 5: Time Frame & Reporting

The appointment will be effective until 31 July 2021 with bi-annual and annual report compilations required as follows:

❖ **Report 1**

Study Period: July 2018 – December 2018
Final Report Submission Date: 25 January 2019

❖ **Report 2**

Study Period: January 2019 – June 2019
Final Report Submission Date: 25 July 2019

❖ **Report 3**

Consolidated Annual Report (July 2018 – June 2019)
Report to include comparative analysis against previous year baseline
Submission Date: 25 July 2019

❖ **Report 4**

Study Period: July 2019 – December 2019
Report Submission Date: 25 January 2020

❖ **Report 5**

Study Period: January 2020 – June 2020
Report Submission Date: 25 July 2020

❖ **Report 6**

Consolidated Annual Report (July 2019 – June 2020)
Report to include comparative analysis against previous year's baseline
Submission Date: 25 July 2020

❖ **Report 7**

Study Period: July 2020 – December 2020
Report Submission Date: 25 January 2021

❖ **Report 8**

Study Period: January 2021 – June 2021

Report Submission Date: 25 July 2021

❖ **Report 9**

Consolidated Annual Report (July 2020 – June 2021)

Report to include comparative analysis against previous year's baseline

Submission Date: 25 July 2021

The appointed Service Provider will be required to prepare a realistic work schedule and ensure that the deadlines as stipulated above are adhered to.

The schedule once approved by Enterprise will be fixed and any deviation from the approved programme will need to be pre-negotiated with the appointed Enterprise iLembe Project Manager.

Reporting

The service provider will work in close co-operation with Enterprise Ilembe who will act as contract co-ordinator and the link between the service provider and the District and Local Municipalities.

The Service Provider will be required to prepare and present progress reports coinciding with each of the agreed milestones. Where considered necessary the Service Provider will also be expected to compile reports and presentations for other bodies as required by the Enterprise Ilembe. The service provider will be expected to keep financial records and other appropriate records.

Section 6: Deliverables & Ceiling Costs

Funding is made available by Enterprise iLembe for the project. Service Providers in their proposals are to set out their approach, methodology, and develop clear milestones against which progress can be monitored and payments made. **Service providers are requested to include the annual budget implications with the escalations.**

Payments will be made on invoices submitted for work completed per achieved milestone. On receipt of invoices rendered the service provider should allow at least 4 weeks for the payments to be processed.

Section 7: Documentation and Confidentiality

Ownership of all documentation, material and data produced within the context of this brief, whether in hard or digital format, shall remain the property of Enterprise iLembe Economic Development Agency.

Information and data which is generated in the context of the project; may not be made available to any third party without prior permission of the Chief Executive Officer. All project material shall be presented in both hard copy and electronic format.

Section 8: Non - Appointment

Enterprise iLembe has a right not to make an appointment should it find that proposals received do not meet the specified criteria / requirements and is not compelled to accept the lowest quotation.

Section 9: Requirements Related to Tender

Please note that it is mandatory to complete Annexure A, MBD 1, 4 and 6.1 forms. Failure to complete these documents and return it with your submission will disqualify your bid in its entirety.

Submission of Proposals

Bidders are encouraged to include the following, inter alia, in the detailed proposal:

- *All relevant labelled supporting documents as annexures to the proposal. (Please refer to Section 11 of this document for details regarding the supporting documents required);*
- *Bidders are to submit a summary of previous projects and a list of relevant references.*
- *Bidders are to submit a detailed timeframe with milestones.*

Proposals must be submitted in sealed envelopes endorsed **“PROPOSAL FOR THE APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT TOURISM INDUSTRY RESEARCH”** and must be hand delivered and placed in the tender box at **Sangweni Tourism Centre, Cnr. Link Road & Ballito Drive, Ballito** and addressed to;

The Chief Executive Officer

Enterprise iLembe,

Sangweni Tourism Centre,

Cnr Link Road & Ballito Drive;

and be received on or before : **24 July 2018 at 11h00**

Please note: All proposals must be hand-submitted to the tender box, and incomplete, faxed, emailed applications and applications received after the closing date and time **WILL NOT** be considered. Bidders using a courier service to deliver documents are responsible for ensuring that such delivered documents are physically deposited in the tender box.

Section 10: Adjudication Criteria

Procurement Policy

Bids will be evaluated in terms of the Procurement Policy of Enterprise iLembe as follows:-

➤ All proposals received shall firstly be evaluated on functionality and thereafter only those who qualify for the next stage of evaluation will be evaluated in terms of the PPPFA (No.5 of 2000) read together with the 2017 Preferential Procurement Regulations and the 2011 B-BBEE Regulations.

Any bid that fails to achieve a minimum of 60 points on the functionality evaluation shall not be evaluated further and will be deemed to be non-responsive.

Functionality Evaluation

The functionality evaluation points will be applied as per the table below;-

Competencies

NB: Bidders must demonstrate by submitting documentary proof in relation to the claim of points with respect to the following key competencies/areas in order to claim points in the functionality evaluation:

No:	Competency	Point Allocation	Maximum Points
------------	-------------------	-------------------------	-----------------------

1.	Team Members Experience and Qualifications. <i>(Bidders are to provide copies of educational qualifications of ALL proposed Team Members relevant to this project)</i>	0-1 year 5 1 – 5 years 10 5 – 10 years 20 Above 10 years 30	30
2.	Project Methodology <i>(Bidders are requested to include the detailed methodology in their proposals)</i>	25	25
3.	Proof of previous experience in conducting market research and compilation of tourism statistics reports. <i>(Please include list of contactable references in the prescribed format below)</i>	No qualification 0 National Certificate 20 Degree/ Diploma 35 Post Grad Qualification 45	45

In order to be awarded points for the third competency listed above, please submit the following:

- A list of **contactable references** for similar projects undertaken in the following format:

Client Name	Nature of Work Undertaken	Start Date	Date of Completion	Amount	Client Contact Person	Tel No.

Only bidders who achieve a total of 60 points for functionality in terms of the above will then be evaluated in terms of the 80/20 points scoring system. Bidders wishing to claim preferential points must attach B-BBEE certificate.

The 80/20 preference point scoring system will be applied with points allocated as follows:-

- 80 points for the price;
- 20 points for B-BBEE status level

The 20 preference points will be allocated based on B - BBEE status level of contribution and shall be allocated as per table below:-

Status Level of Contributor	Preference Points on scorecard (80/20 System)
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-contributor	0

Section 11: Required Annexures

1. **Annexure A: Compulsory Information Sheet (see below)**

2. **Service Providers Proposal**

3. **Registration details & Compliance**
 - All interested bidders must be registered on the Central Supplier Database for Government. The detailed registration report must be attached to the proposal (along with the Supplier Number and the Unique registration reference number). **(Compulsory)**. Please visit <https://secure.csd.gov.za/> to register on the Central Supplier Database
 - All bidders must submit a Valid Tax Clearance Certificate (Compulsory). In line with the latest circular from SARS (South African Revenue Services), bidders can now submit a **UNIQUE PIN** to enable the municipality to verify the bidder's tax compliance status online via E-filing.
 - MBD 1, 4 and 6.1 Forms. **Please note that the MBD 6.1 Forms have been revised. Please ensure that the 2017 MBD 6.1 Forms are submitted. These forms are available upon**

request via e-mail or on our website www.enterpriseilembe.co.za (Compulsory). Please note that the SBD forms will not be accepted.

- Bank confirmation letter
- Company registration documents showing all active members/ directors/ shareholders/ owners etc.
- Power of Attorney/ Signing authority where applicable
- B-BBEE Verification Certificate (Please attach the approved B-BBEE accreditation certificate if available in order to claim points for this.)

Points to note regarding the B-BBEE Status Level:

- Bidders other than EMEs must submit 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.
- 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.
- 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.
- 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.

ANNEXURE A – MANDATORY INFORMATION

Name of Company: _____

Contact Person/s: _____

Contact Number/s: _____

E-mail address: _____

Postal Address: _____

Details	Response/Annexure
Bidders Experience and Qualifications.	
Project Methodology	
Proof of Previous Success specific to this project	
Proof of registration on the Central Suppliers Database for Government (Please include Supplier Number and the Unique registration reference number in proposal)	
Business located within the iLembe District	YES <input type="checkbox"/> NO <input type="checkbox"/>
Total Price (Including VAT)	

Above information certified correct:

Signature: _____

Name: _____

Date: _____

NB: By signing this annexure, the bidder accepts the clauses contained within these Terms of Reference.