



UMZIMVUBU

LOCAL MUNICIPALITY

ADVERTISING DATE: 23 January 2020

UMZ/2019-20HERITAGE RESEACH/(LED)

SERVICE PROVIDER TO CONDUCT UMZIMVUBU HERITAGE RESEARCH PROJECT .

Bidders are hereby invited to submit proposals/Quotations service provider Conduct Umzimvubu Heritage research as per terms of reference.

MANDATORY DOCUMENTS TO BE SUBMITTED FAILURE TO DO SO WILL LEAD TO BE NON RESPONSIVE.

Umzimvubu Local Municipality Supply Chain Management will apply. A valid Original Tax Clearance Certificate or confirmation from SARS with a verification pin, copy of company Registration/Founding Statement/CIPC Documents. Certified BBBEE certificate and a combined BBBEE for a joint venture (non-elimination item). JV Agreement for Joint venture. 80/20 evaluation criteria. Prices quoted must be firm and must be inclusive of VAT for vat vendors. Certified ID Copies of Managing Directors/ Owners. CSD Registration and MBD forms 4, 8 and 9 are compulsory submission and Billing Clearance certificate or Statement of Municipal Accounts. Certified copies of Certificates must not be later than 90 days of closing date. **No couriered, faxed, e-mailed and late tenders will be accepted.** Umzimvubu Local Municipality reserves the right not to appoint and value for money will be the key determinant. All quotation must be deposited in the quotation box situated at **Umzimvubu Local Municipality Offices at SCM office 813 Main Street, Mt Frere** not later than **12h00 noon on 04 February 2020**. All tenders must be clearly marked "Name of the project or Reference number". All service providers must be registered on CSD and submit proof. The municipality will not make award any award to a person or persons working for the state.

Enquiries:/ All technical enquiries may be directed to Mr . S.C.Ntinzi & Mr Mbukushe (SCM Manager) 039 255 8506/8555

Other enquiries regarding this Bid may be directed to the office of the Municipal Manager:

Attention: Mr G.P.T Nota

813 Main Street or P/Bag X9020

MT FRERE

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GPT NOTA (MUNICIPAL MANAGER)



UMZIMVUBU
— LOCAL MUNICIPALITY —

TERMS OF REFERENCE
FOR THE
“UMZIMVUBU HERITAGE RESEARCH PROJECT”

Issued and Prepared by:

Umzimvubu Local Municipality
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TERMS OF REFERENCE FOR THE UMZIMVUBU HERITAGE RESEARCH PROJECT

1. BACKGROUND AND OVERVIEW OF THE PROJECT

1.1 INTRODUCTION

The Umzimvubu Local Municipality is within Alfred Nzo District Municipality (ANDM) which is located in the North-Eastern part of the Eastern Cape Province in South Africa, as shown in Figure 1.1 below. The District forms part of the Eastern Cape Province's boundary with the Kwa-Zulu Natal province. The District borders the Kingdom of Lesotho to the north and the district of OR Tambo in the Eastern Cape and Harry Gwala District in Kwa-Zulu Natal. The Umzimvubu Local Municipality is constituted amongst the four local municipalities within the ANDM, others being Matatiele, Mbizana and Ntabankulu Local Municipalities.



Figure 1.1: Alfred Nzo in the Eastern Cape Province and Umzimvubu Local Municipality

Umzimvubu Local Municipality is located in one of the poorest regions of South Africa within the Alfred Nzo District Municipality in the north eastern part of the Eastern Cape Province. It stretches from a border with KwaZulu-Natal to adjacent municipalities of Matatiele, to the north, Ntabankulu and Mbizana to the South as well as Mhlontlo Local Municipality within the OR Tambo District Municipality to the west. The major national road, N2, passes through the municipality and it is one of the busiest transport and passenger routes in the country.

The locality of ULM is faced with a great number of socio-economic challenges. The region is characteristic of high poverty and unemployment levels and low education and skills level. According to the Tourism

1.2 OVERALL OBJECTIVE AND SPECIFIC OBJECTIVES OF THE PROJECT

1.2.1 Overall objective

The overall objective of the project is to study and research which is meant to explore creative ways of boosting the economy of the area through utilization of rich cultural heritage in the area as a drive for tourism development in ULM which will translate into an increase economic growth and development and employment creation within the tourism sector.

1.2.2 Specific Objectives

The specific objectives of the project require the undertaking of the following:

- This synoptic study and research which is meant to explore creative ways of boosting the economy of the area through utilization of rich cultural heritage in the area as a drive for tourism. Various studies have shown that tourism is a fast growing industry and it is labour intensive thus creating opportunities for large scale job creation and small and medium enterprise which could benefit local communities. Small areas as KwaDukuza/Stanger (Shaka's grave), Ncome Museum (Battle of Blood River), 1820 Settler Monument near Makhanda (formerly Grahamstown), Steve Biko Memorial Centre and grave (Ginsberg) near King Williamstown are some demonstrable cases where heritage has been used as an economic stimulus for tourism and local enterprise.
- Identification of key projects for culture and heritage-based economies
- Development of a comprehensive report on how culture and tourism can be utilized for economic development in the Umzimvubu area.

2. SCOPE OF WORK

Tenders are invited from suitably qualified professional service providers to conduct research and submit a well-documented researched report on how culture and heritage can be utilized for economic development in the Umzimvubu area.

The project time frame will be 4 months from the date of appointment of the service provider, which is anticipated to take place at the end of the fourth month.

The Research Document must contain the following:

- Identification, documentation and profiling of each site by a competent researcher.
- Inclusion of the project in local and district as well as provincial heritage and economic development plans.
- Development of an integrated development plan for these projects and a business case.
- Mobilization of public and private resources; public resources as well as call for expression of interest on projects by private sector.
- Implementation that include signage, erection of monuments or narrative plates/plaque, access roads to the sites, infrastructure for some of the sites.

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- Submission of a proposal for these sites to be graded and declared as provincial and national heritage sites.
- Indication of related experience as per the requirements of the project, with verifiable references;
- Comprehensive company profile coupled with an indication of the proposed project team in terms of the activities to be undertaken by each project team member.
- Furthermore the proposal must indicate the contact person to be responsible for the project. In instances where a consortium will be established, the proposal must specify the names of other professionals who will form part of the consortium;
- Clear time frame for completion of the project, including a breakdown indication of completion times for deliverables, duration of the deliverable review process and schedule of PSC meetings and other activities anticipated to take place during the duration of the project. It is recommended that the project process plan allows for a period of 1 week for the review of completed project deliverables where the deliverables would have been presented during a PSC meeting for approval (final deadlines will be further discussed and agreed upon with the successful bidder);
- Clear project budget aligned to tasks or activities and deliverables of the project.

It should be noted it is the responsibility of the service provider to ensure that upon submission of proposals, a valid entity registration document, Tax Clearance Certificate and BBBEE Certificate must be included.

3. KEY DELIVERABLES OF THE PROJECT

- Identification, documentation and profiling of each site by a competent researcher.
- Inclusion of the project in local and district as well as provincial heritage and economic development plans.
- Development of an integrated development plan for these projects and a business case.
- Mobilization of public and private resources; public resources as well as call for expression of interest on projects by private sector.
- Implementation that include signage, erection of monuments or narrative plates/plaque, access roads to the sites, infrastructure for some of the sites.
- Submission of a proposal for these sites to be graded and declared as provincial and national heritage sites.

4. PROJECT MANAGEMENT

In cases where the appointed service provider appoints the services of other consultants or sub-contractors, the appointed service provider will take responsibility of the work of the sub-contractors. The client will deal with

the contracted service provider and not with sub-contracted consultants. The project is to be coordinated and managed by an operational team led by LED Manager: Umzimvubu Local Municipality.

5. ACCOUNTABILITY AND REPORTING MECHANISM

It is expected that regular progress reports will be presented to the PSC on a monthly basis. The Project Manager has the right to change frequency of reporting as and when necessary. Progress reporting will be undertaken in terms of documented reporting and in presentation format at PSC meetings. The service provider will account to Umzimvubu Local Municipality and Department of Economic Development and Environmental Management. Project Manager will monitor the process/ progress on the site.

6. SUBMISSION OF BIDS

Proposals must be placed in a sealed envelope and clearly marked: "Umzimvubu Heritage Research Project" and placed in the tender box in Umzimvubu Local Municipality not later than 12H00 on the _____.

Bidders are requested to ensure that their proposal include the following:

- A comprehensive proposal inclusive of the methodology for conducting and expected final outcomes from the study.
- An All-inclusive Quotation.
- Activity schedule.
- Company profile with a traceable track record and references should also be submitted.
- Proof(s) of accreditation(s).
- A valid copy company Certification as issued by CIPRO.
- A valid original tax clearance certificate.

Evaluation criteria of the tenders

The bids will be evaluated in two stages, namely:

- Stage 1- Functionality
- Stage 2- Price and BBBEE Points
- Only Bidders who score 75% or more on stage 1 would be evaluated further and therefore eligible for the award.

STAGE 1 OF EVALUATION – FUNCTIONALITY

Functionality	100
• Previous Experience	40
• Capacity and Expertise	40
• Methodology	20

STAGE 2 OF EVALUATION – PRICE & PREFERENTIAL POINTS

BBBEE POINTS	20
Price	80
TOTAL	100

✓ **40 points for company experience are spread as follows:**

- Traceable record for successfully completed minimum of 5 projects of this nature/projects of similar nature a maximum of 40 points may be awarded.
- 3-4 projects completed: 30 points
- 1-2 projects completed: 20 points

✓ **40 points for Capacity and Expertise to undertake the project:**

- Company with team member(s) comprises of at least the following areas of expertise:
 - a) Proven years of experience in Research: 20 points
 - b) Research Scientist, Social Scientist or Tourism Development Specialist 20 points

✓ **20 points for Methodology**

The following must be covered on the scope of work:

- Financial projections
- Action plan must articulate time frame, activities, cost as per scope of work

For any Technical queries regarding this tender, please contact Mr S. C. Ntinzi at telephone number 039 255 8500 during office hours or Mr T. Mbukushe from SCM at 039 255 8500

Prepared by:

Ms L. Dina
LED Tourism Officer



Date Prepared

17/01/2020

Approved By:

Mr S.C. Ntinzi (LED Manager)



Date Approved

17/01/2020