REQUEST FOR PROPOSALS

REQUEST FOR PROPOSALS ISSUED BY SOUTH AFRICAN NATIONAL PARKS IN RESPECT OF THE PROPOSED PUBLIC PRIVATE PARTNERSHIP PROJECT FOR THE PHABENI EDUCATION CENTRE IN THE KRUGER NATIONAL PARK
IMPORTANT NOTICE

This Request for Proposals ("RFP"), incorporating all its attachments, has been produced by South African National Parks ("SANParks"), in connection with the tourism public private partnership opportunity available at the Phabeni Education Centre in the Kruger National Park.

No representation or warranty, express or implied, is made, or responsibility of any kind is or will be accepted, by South African National Parks, with respect to the accuracy and completeness of the RFP, and any liability in connection with the use by any interested party of the information contained in this RFP is hereby disclaimed.

The RFP is provided to the recipient to assist in making its own appraisal of the Public Private Partnership ("PPP") opportunity presented herein and in deciding whether to submit a proposal in connection with the opportunity. However, this RFP is not intended to serve as the basis for an investment decision on the opportunity, and each recipient is expected to make such independent investigation and to obtain such independent advice, as he or she may deem necessary for such a decision.

South African National Parks may amend or replace any information contained in this RFP at any time, without giving any prior notice or providing any reason. Should this RFP lead to the award of the PPP Project, the award will only become binding after SANParks and the Private Party have signed the agreement.

November 2018
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1. INTRODUCTION

1.1 This Request for Proposals ("RFP") is issued by South African National Parks ("SANParks") in accordance with the guidelines for Public Private Partnerships ("PPPs") contained in National Treasury's Tourism PPP Toolkit, and in compliance with Treasury Regulation 16 issued in terms of the Public Finance Management Act 1999.

1.2 SANParks, as part of its Strategic Plan for Commercialisation, identified the PPP opportunity at the Phabeni Education Centre in the Kruger National Park ("KNP").

1.3 It is intended that by SANParks entering into the PPPs with a Private Party, SANParks may be able to generate additional revenue through PPP fees paid to SANParks by the Private Party and to receive training integral to the success of the operations, while enabling SANParks to focus on its core activity of conservation. It is intended that the project will be developed by the Private Party in compliance with strict environmental standards maintained by SANParks. In keeping with SANParks’ objectives, particular attention will be paid to the implementation of broad-based Black Economic Empowerment ("BEE"), particularly those from local communities adjacent to the Parks. In addition, private operators will have to respect existing SANParks regulations regarding protection of the environment. In this regard, SANParks will require that Interested Parties confirm their willingness to promote BEE by entering into an agreement with a local community trust partner.

1.4 Value-for-Money Objectives

The value-for-money objectives for the project are aligned with SANParks' strategic objectives included in the Strategic Plan for Commercialisation. Setting these objectives at the inception phase are vital as they provide the benchmarks for the feasibility and procurement phases. During the management of the PPP agreement, they are used to measure the success of the project.

The Value-for-Money Objectives for the Phabeni Education Centre project are:

1.4.1 BEE, job creation and community development;
1.4.2 Optimal use of under-performing assets; and

1.4.3 Biodiversity protection and conservation.

2. GENERAL RULES OF THE TENDER

2.1 This RFP supersedes all other SANParks communication to Bidders about this PPP opportunity and the rules and conduct of the bid.

2.2 No verbal discussion with any staff or advisor of SANParks can change, add to or clarify any of the terms and conditions contained in this RFP. Bidders should only rely on written changes, additions or clarifications from the duly authorised Project Officer of SANParks, circulated to each bidder. E-mail communications from SANParks to Bidders will count as written communication.

2.3 SANParks reserves the right to modify the timetable in Article 5 or otherwise amend, supplement or clarify the RFP at any time. SANParks may cancel the bid at any time without prior notice, and may disqualify any bidder as provided for in this RFP. SANParks shall not incur any liability whatsoever in exercising any rights in this Article 2.3 or otherwise granted in this RFP or available under the laws of the Republic of South Africa.

2.4 The bid will be conducted in accordance with, and shall be governed by the laws of the Republic of South Africa and this RFP.

2.5 Bids and all correspondence and documents relating to Bids shall be in the English language.

2.6 The submission of a Bid by a Bidder implies full knowledge and acceptance of, and submission to, all the terms and conditions set out in this RFP, the PPP Agreement and under the applicable laws of the Republic of South Africa.

2.7 Bidders shall be responsible for any and all costs, expenses and losses incurred by them in the preparation and submission of Bids or otherwise in connection with the Tender. SANParks will not compensate Bidders for any such costs, expenses or losses, regardless of the outcome of the Tender.
2.8 The draft PPP Agreements will be included in the Tender Documents and will be ready for distribution shortly after the site visit. SANParks reserves the right to modify or otherwise amend, supplement or clarify the PPP Agreements at any time. SANParks shall not incur any liability whatsoever in exercising any rights in this Article or otherwise granted in this RFP, PPP Agreements or available under the laws of the Republic of South Africa.

3. **IDENTITY OF BIDDERS**

3.1 A Bidder may be a single company or an unincorporated joint venture or a trust or a non-profit organization that operates independently from Government (NGO) and / or a section 21 company who will have associated benefits of sourcing funding through donors. The Bidder must meet the operational and financial criteria as contained in this document.

3.2 Public institutions are specifically excluded from submitting proposals or bidding for the tender.

3.3 Each submission must set out, in detail, the structure that will be adopted for the entity. The shareholders should be clearly identified, and their roles and responsibilities listed. The submission should list the equity, ownership and directorships held by shareholders. SANParks requires that Interested Parties create a newly formed special purpose vehicle ("SPV") for bidding purposes. The sole purpose of the SPV will be to undertake the PPP Project. Where any parties are not shareholders, but will be integrally involved in the operation of the SPV, such parties should also be listed. It will be expected that the SPV is legally constituted prior to the Bid date.

3.4 As the project might require a substantial amount of capital investment, Interested Parties must demonstrate their ability to raise debt and equity and to provide security to SANParks’ satisfaction.

3.5 Interested Parties will also be required to provide information on ownership of the entities of which the Interested Parties are comprised, together with organograms reflecting the ownership proportions.

3.6 When preparing submissions on the identity of the bidders, Interested Parties are
required to structure their submissions following the format:

3.6.1 submit to SANParks the information set out in Annexure 1A in relation to the Qualification Criteria;

3.6.2 submit to SANParks the information set out in Annexure 1B in relation to the company, unincorporated joint venture or trust and its shareholders, partners of beneficiaries; and

3.6.3 certify to SANParks that the information contained therein is true, accurate and complete in all respects.

3.7 SANParks reserves the right to request, at any time, additional information or documentation from Bidders.

3.8 Where a Bidder is made up of a number of parties, shareholders in one SPV may not in any way be shareholders of other SPV’s bidding for the same PPP Opportunity in the tender process.

**Information on the opportunity**

4. A DESCRIPTION OF THE PPP OPPORTUNITY FOR THE PHABENI EDUCATION CENTRE IN THE KRUGER NATIONAL PARK

The Phabeni Education Centre PPP opportunity available to Bidders is herewith summarised as follows:

4.1 **Introduction**

SANParks, as part of its Strategic Plan for Commercialisation, identified the Phabeni Education Centre as a potential facility to be utilised by the Private Sector to create environmentally literate and active citizens through environmental education, involving an inter-disciplinary, integrated and active approach to learning. The Phabeni EE centre should play a key role in creating environmental ambassadors by providing fun, educational, collaborative and innovative solutions to global environmental problems by harnessing the power of all people. SANParks
sees the partnership with a Private Party (EE training partner) as being more than merely running environmental education courses for young learners, but providing an integrated approach to creating responsible environmental stewards by developing learning material and courses that cater to a range of ages and education levels:

- young learners (3-10 years, e-learning and material to be used for schools outreach);
- local and TFCA school groups (10-18yrs- majority of the participants of the overnight programmes at the Phabeni EE centre); and
- adults (with special focus on local school teachers).

Training courses should be directly linked to key environmental objectives and outcomes and the Private Party should, through training and education ensure that all South Africans, present and future, enjoy a decent quality of life through the sustainable use of resources (Principle No. 20:22, RSA, 1995).

SANParks completed the Phabeni Education Centre, which currently stands empty (unutilized) and will therefore deteriorate over time. However, expertise does exist in the market to utilize the centre optimally to fulfill the SANParks objectives as outlined above and inclusive of the following:

- Giving educational training to a variety of people;
- Provide formal accredited nature training courses;
- Provide a wide variety of training courses (short to long courses);
- Ability to train guides, school children, tourist (who has an interest in nature and who would like to get a better understanding of nature and conservation) and community members;
- Provide ranger training;
- Present summer schools;
- Present advanced courses such as first rifle training. Where access to big game areas are required SANParks involvement will be integral and will require compilation of an operating procedure which could include but are not limited to (a) close coordination with SANParks to identify the area, (b) facilitation of involvement of SANParks staff, (c) obtain approval to utilise the area and (d) to agree on payment of SANParks staff; and
• Various courses could be presented to SANParks staff at the normal rate but the Private Party will not be the sole service provider of such courses. Courses could include topics such as (a) 101 of conservation, (b) bird and reptile courses, (c) astronomy courses, (d) hospitality courses i.e. interacting with guests as well as (e) housekeeping courses.

The above should all be done in collaboration with SANParks’ P&C department and to ultimately create conservation and nature ambassadors. Education and training presented at the Phabeni Education centre should specifically focus on environmental education and conservation of the environment i.e. not a school set-up where mathematics classes are presented.

The following is important to note:

The Private Party will be required to avail the Education centre for 30% of the year (109 days that need not be concurrently except for the months of August and September as outlined below) for specific environmental education as currently performed by the SANParks team and during this time SANParks’ P&C unit could be fully involved with the programs presented. Where SANParks chooses to not be involved, The Private Party will still be expected to provide Environmental Education to identified learners. During this time the focus should be on school learners who should be taught about the environment. The 109 days should include the months of August and September as the Department of Education funds the programs over these months.

The optimal model is as follows:

(a) SANParks and the Private Party develops course material together and a model is facilitated by the Private Party whereby environmental education is presented to the learners over a period of 109 days of the 365 days. Focus should be on local schools (within a 50 kilometre radius from the facility);

(b) The remaining 256 days are for the use by the Private Party to present environmental education and/or training and to generate income to:

- Fund the environmental education in (a) above; and
- Generate profits for the company (if the Private Party is a company established to make profits and not a non-profit organisation).

(c) The Private Party will be encouraged to implement models and use established networks to raise funds to grow the environmental education program. The Private Party will be required to report on children trained but also to implement
initiatives to monitor the success of the environmental education programs.

It is intended that by SANParks entering into the PPP with a Private Party, SANParks may be able to optimally use the Phabeni Education centre to build skills that could be used in the Kruger National Park and other parks. The centre has the ability to attract investment to teach local community members of conservation and to assist them to acquire the rights skills and qualification to secure permanent jobs in National Parks and other conservation areas. This will be done while enabling SANParks to focus on its core activity of conservation. In keeping with SANParks’ objectives, particular attention will be paid to the implementation of broad-based Black Economic Empowerment ("BEE"), particularly those from local communities adjacent to the Parks. In this regard, SANParks will require that Interested Parties confirm their willingness to promote BEE by entering into an agreement with a local community trust partner. In addition, private operators will have to respect existing SANParks regulations regarding protection of the environment. It is intended that the project will be developed by the Private Party in compliance with strict environmental standards maintained by SANParks.

The following map outlines the area that will be available to the Private Party for exclusive use:

![Figure 1: Area included with the Phabeni Education Centre](image)

It should be noted that the fencing (red line) has not been done and will be the responsibility of the Private Party.
The following (or similar) will be allowed in the area (subject to the required environmental approvals that needs to be obtained by the Private Party) and only once the fencing was erected (in line with SANParks’ specifications):

- Trail running course and walking trails
- Acrobranch course
- Astronomy
- Tented camp (for use by the course delegates)
- Other camping areas for self-pitch course delegates
- Other activities within the fenced area

Figure 2: Infrastructure at the Centre

As per the Park Management Plan, the following:

The area in which the Phabeni Education centre is located is zoned as High Intensity Leisure and Primitive. In light of that various initiatives could be undertaken in the area to make the product presented attractive for the Private Party.
4.2 Location Map

The Phabeni Education centre is located in close proximity to the Phabeni gate – just south of the gate. Access to the site will be via the Phabeni gate. The peripheral location of the site whilst being located in a pristine wildlife setting and being in close proximity to local communities makes for an ideal location to present various education activities and training courses.

The following maps shows the location of the Phabeni Education centre:

![Location Map](image)

Figure 3: Location Phabeni Education Centre

4.3 Specific Conditions and Description

4.3.1 Location

The Phabeni Education centre is located just south of the Phabeni gate on the periphery / adjacent to the railway line.

4.3.2 Description

The following buildings are in place at the Phabeni Education Centre:

- Four dormitories that can sleep approximately 15 each;
- On suite bedrooms (two in total) for senior staff accompanying the groups;
- Ablution facilities;
- Kitchen facilities (fully equipped with walk in freezers and fridges but due to the time lapse some issues might be encountered with the compressors);
4.3.3 Opportunities

Opportunities are linked to optimal use of the existing centre and to attract learners to the park for a variety of courses to learn from conservation and skill themselves to pursue a career in conservation.

4.3.4 Development Site

Development will be limited to the greater precinct as the education centre is fully functional and would not require major changes. The greater precinct is approximately 80 hectares in size and is available to conduct in-bush training and activities but will require fencing for optimal use. Various activities could be presented here but will require relevant authorisations.

4.3.5 Infrastructure Present

The following buildings are in place at the Phabeni Education Centre:

- Four dormitories that can sleep approximately 15 each;
- On suite bedrooms for senior staff accompanying the groups;
- Ablution facilities;
- Kitchen facilities (fully equipped with walk in freezers and fridges);
- Boma area;
- Conference room; and

On suite staff units (x 4) inclusive of communal kitchen area (fully equipped).

4.3.6 Roads and Tracks

Access to the site is via a well-established road. Within the greater precinct the
operator will be required to establish tracks such as mountain biking tracks, tracks to be used by seqways and/or or hiking trails. The operator will not be allowed to build any new roads on this precinct.

4.3.7 **Access**

Access to the site is via a well-established road directly south of the Phabeni Gate. All guests / students visiting the facility will be required to pay requisite Park entry fees.

4.3.8 **Support Infrastructure**

4.3.8.1 **Water**

Potable borehole water is available on site. Water usage will be metered and the operator will pay for water use in line with the KNP tariff document.

The water tariffs (as per the 2016/2017 tariff document) are:

- 0-200 Kl at R 2.96/Kl;
- Above 200 Kl at R 3.30 / Kl

4.3.8.2 **Electricity**

There is Eskom electricity available as well as a hybrid power system of 5 KVA.

Electricity usage will be metered and the operator will pay for electricity use in line with the KNP tariff document.

The electricity tariffs (as per the 2016/2017 tariff document) are:

- Eskom electricity at R 1.35 / unit consumed
- Capacity could be added to the 5 KVA hybrid power system at the operators costs and with SANParks’ Technical Services Dept. approval.

4.3.8.3 **Waste**

The operator will be responsible for recycling of solid waste on site and to transport the waste to an approved landfill site outside the Kruger
National Park and to approved re-cycling depots.

In addition to solid waste, the operator will be responsible for maintenance of the sewerage system on site.

4.3.8.4 Communications

Cellular signals are available but could be intermittent.

4.4 Value for Money Objectives

The value-for-money objectives for the project have to be aligned with SANParks’ strategic objectives included in the Strategic Plan for Commercialisation. Setting these objectives at the inception phase are vital as they provide the benchmarks for the feasibility and procurement phases. During the management of the PPP agreement, they are used to measure the success of the project.

The Value-for-Money Objectives for the project are:

- Revenue generation for SANParks (limited);
- BEE, job creation and community development; and
- Conservation Management through skilling a variety of people.

4.5 Phabeni Education Centre Minimum Development Specifications

Limited development will be required due to the existence of the infrastructure. In light of that the only requirement will be for the operator to fence the 80 hectares for this area to be used as part of the product offering. Additional developments within the fenced in area will be as per the curriculum of the operator (complimenting the product on offer) and with the approval from SANParks (which will not be unreasonable withheld) together with the necessary environmental approvals. A tented camp could be developed subject to the Private Party obtaining the required approvals and should not exceed the number of beds as outlined in the KNP Park Management Plan as revised in 2017 (as per specific zone). The tented camp should complement the objectives of the Education Centre and be used for education / training and should not be sold as accommodation units only.

4.6 Zoning
The Phabeni Education Centre is on the periphery of the park and falls within a High Intensity and primitive zone.

4.7 Concession audits

The operator will be required to do annual ECO audits at their own cost to obtain verification that no activities happen which has a negative effect on the environment.

4.8 Environmental considerations

The Private Party is to incorporate the green standard guidelines when designing any additional infrastructure within the Phabeni Education Centre precinct.

4.9 Staff housing

Three on suite staff units (inclusive of communal kitchen area which is fully equipped) are available and could be allocated. No additional staff housing will be allowed hence any additional staff should stay outside the park.

4.10 Community Involvement

SANParks is implementing a model whereby a Local Community shares ownership in the opportunity. The Tourism BEE Scorecard has a target of 10% ownership going towards a local community trust. It is imperative that local communities become part of commercial opportunities in the park hence this needs to be implemented by the operator.

5. TIMETABLE

The Tender shall take place in accordance with the timetable set out in this Article 5. SANParks reserves the right to modify the timetable at any time. SANParks shall not incur any liability whatsoever in exercising any rights in this Article 5 or otherwise granted in this RFP or available under the laws of the Republic of South Africa.
### EVENT

<table>
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<tr>
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<td>21 January 2019</td>
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<tr>
<td>Due Diligence Site Visits</td>
<td>23 January 2019</td>
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<tr>
<td>Bidders Conference</td>
<td>4 February 2019</td>
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<td>Submission by Bidders of Comments &amp; Questions</td>
<td>8 February 2019</td>
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<td>Distribute Question and Answer as well as final tender</td>
<td>13 February 2019</td>
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<td>Tender Submissions</td>
<td>15 March 2019 before 11h00</td>
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<td>Bid Adjudication</td>
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6. **BIDDERS REQUIRED QUALIFICATION CRITERIA**

In order to participate in the bidding process, bidders are required to meet the qualification criteria as outlined in Section 1A – Qualification Submissions. If not met, the bid will not be considered.

7. **SITE VISITS AND DUE DILIGENCE**

7.1 The Site Visit and Due Diligence process is being organised for the Bidders with the following objectives:

7.1.1 to provide all Bidders the opportunity to ascertain all information they need to present informed and competitive bids for the sites they are qualified to bid for, including physical facilities; and

7.1.2 to ensure that such access to information is equal for all Bidders.
7.2 Due Diligence site information will be provided to Bidders by means of a site visit to the Phabeni Education Centre on 23 January 2019.

7.3 For this purpose, all interested bidders are required to register for this site visit by sending their Names, Company, Contact telephone, fax number and e-mail to:

Mr James Daniels  
Tel: (012) 426-5280  
E-mail: james.daniels@sanparks.org

and by 21 January 2019.

7.4 Attendance will inform Bidders of possible challenges and opportunities that may or may not have an impact on the feasibility studies conducted by Bidders and will further serve to ensure the accuracy of viabilities conducted for the facility.

7.5 This site visit will form part of the due diligence process and should be attended by the bidders or a duly authorized representative.

7.6 The programmes will be distributed to interested bidders upon registration.

7.7 Please note that traveling and accommodation costs for this visit will be for your own account.

7.8 Each Bidder shall be solely responsible for its own due diligence investigation of the investment opportunity, the proposed PPP Agreement terms and all matters relating to this RFP. Neither SANParks nor any of their respective officers, employees, agents or advisers makes any representation or warranty, express or implied, concerning any matter affecting the PPP opportunity, except for the representations and warranties of SANParks that will be set out in the PPP Agreement.

7.9 No verbal agreement or conversation with, nor any verbal clarification from, any officer or employee of SANParks or any of their advisers shall affect or modify any of the terms and conditions contained in this RFP. Only written amendments, supplements or clarifications to this RFP from duly authorised Project Officer of SANParks, circulated to each Bidder, should be relied upon as authorised. For the purposes of this Article 7.9, communications sent from duly authorised staff of SANParks to Bidders via electronic mail shall be deemed as communications in
7.10 **Contact for Due Diligence-related Matters**

The principal contact in SANParks for all matters relating to the Due Diligence process will be:

Mr James Daniels  
Tel: (012) 426-5280  
E-mail: james.daniels@sanparks.org

8. **BID SUBMISSIONS**

8.1 Bids must be submitted to:

The Project Officer  
James Daniels  
South African National Parks  
643 Leyds Street,  
Muckleneuk,  
Pretoria.

8.2 Bid Submissions should be made by latest 11h00 on 15 March 2019 (the “**Bid Date**”).

8.3 Submissions delivered after 11:00 on the Bid Date shall be regarded as invalid, and returned to the Bidder, unopened.

9. **CONTENTS OF BID SUBMISSIONS**

9.1 Bids and all related correspondence and documents must be in English.

9.2 The bid submission from each bidder must contain all the information necessary for SANParks to evaluate the financial, broad-based black economic empowerment and functionality capabilities of the bidder. Bidders are required to submit two sealed envelopes in accordance with the directions below.
9.3 The first envelope shall be clearly marked “Technical Criteria - original” on the outside and shall contain all the original non-financial aspects of the Submission ("Technical Offer"). The contents of the Technical Offer shall consist of:

9.3.1 The original of the Bidder Information, in the format given in Section 1A – Qualification Submissions;

9.3.2 The original of the Bidder Information, in the format given in Section 1B – Information on Bidders;

9.3.3 Original of the Financing and Capital plan, in the format given in Section 2 – Financing and Capital Plan;

9.3.4 Original of the Business, Operational and Design plan, in the format given in Section 3 – Business Operational and Design Plan;

9.3.5 Original of the Environmental Proposal, in the format given in Section 4 – Environmental Proposal;

9.3.6 Original of a completed Risk Matrix, in the format given in Section 5 – Risk Matrix;

9.3.7 Original of the BEE proposal, in the format given in Section 6 – B-BBEE Proposal;

9.3.8 An original tax clearance certificate, issued by the South African Revenue Service (“SARS”) within six months of the bid date, for each South African member of the bidder;

9.3.9 An original signed version of the final PPP Agreement including all the relevant sections of the Bid Submission to be included in the PPP Agreement, with each page initialled by the duly authorised representative;

9.3.10 An original Bid Bond from a reputable bank in a form substantially similar to that set out in Annexure 2 - Acceptable wording of bid and development bond; and

9.3.11 VERY IMPORTANT: An electronic copy containing all the Annexures (clearly marked) of the bid submission should be submitted on USB disk. The annexures should be in non-edited PDF form and will be used for evaluation purposes. Please
note that the PPP fee offer should NOT be disclosed anywhere on the USB in electronic format.

9.4 The **second envelope** shall be clearly marked “BEE and Financial” on the outside and will only be opened and evaluated if the minimum threshold for functionality is met. The contents of this Envelope shall be the current BEE status of the bidder (verified by a BEE certificate) as well as the PPP Fee Offer in the format in Section 7 – PPP Fee Offer. Please note that SANParks reserves the right to disqualify any bidder who does not submit a valid BEE certificate or whose PPP fee offer is not in the specified format. Please note that PPP fee tranches is not allowed unless requested as part of the PPP Fee Offer Format.

9.5 Envelopes should be clearly marked as to whether they are Envelope 1 or 2 and must have the bid cover letter in the format Annexure 1 – Bid Cover Sheets attached to the front of each envelope.

9.6 All information provided in the bid must be valid for 90 business days from the Bid Date.

9.7 Submitting a bid implies that the bidder knows and understands all the terms and conditions set out in this RFP and under the applicable laws of the Republic of South Africa, and that the bidder accepts these terms and conditions.

10. **HOW THE BIDS WILL BE OPENED**

10.1 The Project Officer will separate Envelopes 1 and 2 of all the bids. The unopened Financial Envelopes will be locked away in the safekeeping of SANParks’ legal advisors until they are opened following the evaluation of the bids.

10.2 The Technical Envelopes will be opened by members of a bid evaluation committee representing SANParks in the presence of SANParks’ Project Officer.

10.3 Technical Offers will be evaluated and scored according to the procedure set out in Articles 11 to 13 below.
11. BID EVALUATION METHODOLOGY (FOLLOWING QUALIFICATION)

11.1 The three main elements of the bid and the two-Envelope system

11.1.1 Bids will be evaluated on three main elements: Functionality, BEE and the PPP Fee Offer.

11.1.2 Envelope 1 is for the functionality and is opened first. Bidders must score at least 75% for functionality (Please note that functionality will contain a section which outlines the BEE plans for the SPV and will be scored as part of functionality).

11.1.3 Envelope 2 contains the current BEE status of the bidder (verified by a BEE certificate) as well as the PPP Fee Offer and will only be opened and evaluated if the minimum threshold in Article 11.1.2 is met.

12. HOW BEE IS EVALUATED

12.1 BEE will be evaluated in two ways:

12.1.1 as part of Functionality in which the Private Party SPV will outline their plans through the Tourism BEE scorecard with targets per sub section as well as a section which undertakes that enterprise development initiatives will be identified and implemented.

12.1.2 In round two (together with price) as per the PPPFA – only for bidders who passed the functionality threshold will be evaluated on their current BEE certificate.

13. SCORING FOR FUNCTIONALITY (ENVELOPE 1)

The functionality aspects of a bid will be scored out of 100 points. A bidder must achieve 75% of the total functionality points in order to pass. Functionality is made up of the elements and weights as outlined in Table 1: Sub-functionality weightings.

<table>
<thead>
<tr>
<th>Elements</th>
<th>Finance and Capital Plan</th>
<th>Risk Matrix</th>
<th>Environmental Plan</th>
<th>Business, Ops and Design Plan</th>
<th>BEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weight</td>
<td>15%</td>
<td>5%</td>
<td>15%</td>
<td>45%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Table 1: Sub-functionality weightings
The following outlines the objective of each element:

13.1  **Financing and Capital plan**

13.1.1 A bidder is expected to provide financing information in line with the requirements set out in Section 2 – Financing and Capital Plan.

13.1.2 The purpose of the Financing and Capital Plan is to assess the ability of the Bidder to secure adequate finance to implement the project and determine the capital investment proposed for the project. It will indicate how much capital will be needed, where it will come from (own capital, grants, loans) and the expected amount and terms (interest rate, repayment period, security) of any proposed loans, whether the necessary financing has been secured and appropriate proof.

13.1.3 A maximum total of 15 points has been allocated to the bidders financing plan.

13.2  **Business Operational and Design plan**

13.2.1 A bidder is expected to provide a business and operational plan in line with the requirements set out in Section 3 – Business Operational and Design Plan.

13.2.2 The purpose of the evaluation of the business, operational and design plan is to ensure that the bidder has fully developed all business aspects of the proposed tourism project, and is proposing credible schemes which are based on generally accepted business, and which are in line with SANParks’ specifications given in this RFP.

13.2.3 A maximum total of 45 points has been allocated for the business and operational plan.

13.3  **Environmental plan**

13.3.1 SANParks shall review and evaluate the development and environmental plans submitted by bidders in accordance with the specifications and information given in Section 4 – Environmental Proposal.
13.3.2 The purpose of the evaluation of development and environmental proposals is to ensure that bidders understand and have fully planned for the prevailing environmental issues that apply to the investment area as well as the Environmental Guidelines and have factored those issues into their plans.

13.3.3 Approval by the evaluation committee of such plans will not be taken to mean that the individual details of the proposal can be implemented – in all cases, the proposal must go through the Environmental Impact Assessment process (Operator responsible for all environmental approvals and processes and cost associated - including all specialised studies).

13.3.4 The operator will be required to obtain all environmental approvals at their own cost i.e. cost associated with EIA processes.

13.3.5 A score out of 15 will be awarded for the environmental competence of the bidder.

13.4 Risk Matrix

13.4.1 A bidder must indicate the extent to which the bid complies with the risk allocation of the risk matrix given in Section 5 – Risk Matrix.

13.4.2 A maximum of 5 points has been allocated to assessing compliance with risk allocation.

13.5 BEE

13.5.1 The Private Party SPV is expected to outline their BEE plans through the Tourism BEE scorecard with targets per sub section as well as a section which undertakes that enterprise development initiatives will be identified and implemented during the contract period.

13.5.2 An accredited BEE auditor will audit the targets set and number of enterprises developed on an annual basis.

13.5.3 The BEE weighting is outlined in Table 1: Sub-functionality weightings. A maximum of 20 points has been allocated for BEE plans.
14. BEE AND FINANCIAL BIDS (ENVELOPE 2)

14.1 If the minimum threshold for functionality is met by the Bidders, envelope 2 will be opened.

14.2 BEE

14.2.1 The Preferential Procurement Policy Framework Act, 2001 (PPPFA) amended in 2017 will apply with an 80/20 split between the PPP Fee Offer and BEE respectively.

14.2.2 The following table outlines the final score weightings:

<table>
<thead>
<tr>
<th>PPP fee</th>
<th>BEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>80%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Table 2: PPPFA score split

14.3 PPP Fee Offer

14.3.1 Under the PPP Agreement, the PPP fee income to SANParks shall be, as given in the Annexures of the document, the higher of:

14.3.1.1 the Minimum PPP Fee increased annually by CPIX; or
14.3.1.2 the Variable PPP Fee expressed as a flat percentage of the gross revenue of the operation.

14.3.2 Each PPP Fee Offer will be inspected by SANParks' financial and legal advisors to verify that it has been submitted in the form corresponding to the requirements. A PPP Fee Offer that does not conform to the requirements may result in disqualification of the bid.

14.3.3 The points for the PPP Fee Offer are calculated using the prescribed price formula in the regulations to the PPPFA. The maximum points will be awarded to the qualified bidder that makes the highest PPP Fee Offer and the remaining points being allocated pro rata to the remaining qualified Bidders. Bidders should be aware that a minimum PPP fee might be applied. If the minimum is not reached, the contract might not be awarded.
14.3.4 The PPP fee proposal is scored out of 100 points.

15. **INCOMPLETE BIDS**

15.1 The bid evaluation committee, in consultation with its financial and legal advisors, will check Envelope 1 of each bid to see whether the all the documentation that this RFP requires has been submitted correctly.

15.2 If a bid is not complete or something in it is not clear, the bid evaluation committee may, but is not obliged to, ask Bidders for more information. Bidders will receive such requests for more information in writing. No substantial changes to the bid will be asked for or allowed, except if there is a clear mistake in the bid.

15.3 SANParks may, but is not obliged to, disqualify a bid that is not complete or requires clarification without a request for further information.

15.4 SANParks shall not be obliged to reimburse Bidders for any costs and/or damage they incurred during the preparation of Bid Submissions, in the event of cancellation, disqualification, suspension, modification or delay of the Tender.

16. **SELECTION OF PREFERRED BIDDER**

16.1 The functionality score is only used to pre-qualify the bidders and only bidders who achieved the 75% for functionality are considered in the final stage where BEE and price will be the determining factor.

16.2 SANParks shall calculate the scores of each bid to calculate an overall bid score.

16.3 The following outlines how the overall score (for all qualified bidders) will be determined:

\[ a \times \left( \frac{\text{BEE score}}{100} \right) + b \times \left( \frac{\text{PPP fee score}}{100} \right) = c \]

- \( a \) is the weighting for BEE as outlined in 14.2.2
- \( b \) is the weighting for PPP fee as outlined in 14.2.2
- \( c \) is the bidder’s overall score
16.4 The bidder that receives the highest overall bid score will be declared the preferred bidder; and the bidder that receives the second highest overall bid score will be declared the reserve bidder.

16.5 The scores will be presented to the SANParks Bid Adjudication Committee (BAC) for ratification.

16.6 Once ratified, the preferred bidder will be announced.

17. **SIGNATURE AND EFFECTIVENESS OF PPP AGREEMENT**

17.1 It is anticipated that the PPP Agreement of the Preferred Bidder will be countersigned by SANParks within 1 month from the opening of the PPP fee offer.

17.2 The PPP Agreement becomes legally binding and enforceable from the Signature Date. Only after completion of certain Compliance Events can operation commence.

17.3 There will be no PPP Fees payable before Effective Date with Effective Date defined as “12 (twelve) months after the Signature Date or Operation Commencement Date, whichever comes earlier”.

18. **BID BOND**

18.1 At the time of submitting its Bid, each Bidder for Bid Package 1 must submit a single Bid Bond (“**Bid Bond**”) payable to SANParks in the format prescribed in Annexure 2 - Acceptable wording of bid and development bond OR by paying the amount into SANParks’ account – the following account number is to be used:

18.2 Bid Bonds should be for the amount of R40,000 (Forty Thousand Rand).

18.3 The posting of the Bid Bond is for the purpose of ensuring that the all Bidders present valid and serious bids, and that the Winning Bidder subsequently executes the PPP Agreement.

18.4 Bid Bonds must be valid until the Effective Date which shall not be later than 12 months from signature date.
18.5 The Bid Bonds of all Bidders other than the Winning Bidder shall be returned to them following signature by SANParks of the PPP Agreement. Money paid into the SANParks’ account will be paid back to the bidder after an original letter of the bank account was received from the bidder.

18.6 Any of the following shall be grounds for the forfeiture of a Bidder’s Bid Bond:

18.6.1 Any material misrepresentation made by the Bidder in its Bid Submission, or any other information and documentation submitted by it under this RFP;

18.6.2 The withdrawal or modification of its Bid during the period of validity;

18.6.3 Failure by the preferred bidder to furnish the required Performance Bond under the PPP Agreement in accordance with the provisions of the PPP Agreement.

18.7 The Bid Bond shall be callable upon first demand by SANParks in the event that one or more of the circumstances described at Article 18.6 above has occurred. Forfeiture of the Bid Bond shall not preclude SANParks from pursuing any other remedies it may have against the Bidder under the laws of South Africa.

19. FURTHER INFORMATION

19.1 All enquiries and requests for further information in respect of the RFP must be in writing, and directed to SANParks at the following address:

SOUTH AFRICAN NATIONAL PARKS

James Daniels
P O Box 787
PRETORIA, 0001
643 Leyds Street
Muckleneuk, Pretoria
Telephone: +27 12 426 5280
E-mail: james.daniels@sanparks.org

19.2 All responses to enquiries may be circulated to other Interested Parties. No other communication with SANParks in respect of the RFP will be permitted.
20. SECTION 1A – QUALIFICATION SUBMISSIONS

In order to participate in the bidding process, bidders are required to meet the following qualification criteria:

20.1 Financial capacity

20.1.1 It is important that interested parties demonstrate financial strength to optimise the operation of the Phabeni Education Centre. In this regard the net asset value of the interested party must be at least R5 million.

20.1.2 As the preferred bidder must be a SPV, it must demonstrate financial strength with reference to the asset value of its shareholders in proportion to their shareholding. The interested party must also demonstrate, to SANParks’ satisfaction, that its shareholders are solvent. Audited financial statements, along with a letter confirming that the asset value exceeds the stipulated amount and that the shareholders are solvent, must be provided if demanded by SANParks in order to illustrate any assertion made by an interested party in this regard.

20.2 Education and Training experience

The project is likely to require interested parties with substantial experience and expertise in educating and training a variety of people in conservation ethics and principles. Interested parties are therefore required to provide examples of similar projects conducted by the interested parties. The interested party must be able to meet this track-record requirement in the following ways:

20.2.1 The interested bidder must have proven experience in the education field and must have an existing curriculum of conservation related subjects that has been presented over the last 3 years;

20.2.2 Management of an education centre / training academy of no less than 3 years. The
definition “management” should include proof that the company was operational, that students were attracted to the academy through appropriate channels, that course fees were charged, that official qualifications were presented and that a clear income statement exist showing income versus expenses with associated profits; and

20.2.3 the bidding company must have at least 2 education centres from where training is presented.

20.3 **Financial Requirements**

20.3.1 The Submitting Company shall submit the following economic and financial documentation:

20.3.1.1 audited financial statements corresponding to the last two (2) years;

20.3.1.2 annual reports for the last two (2) years;

20.3.2 If the qualification criteria are being met by reference to any other companies, whether current or intended Shareholders or partners, then these companies must submit the same information.

20.3.3 If the financial criteria are being met by companies which are privately held, and do not produce audited statements, or by private individuals, then these companies or individuals must produce a statement of assets, with confirmation of ownership, certified by a qualified auditor.
21. **SECTION 1B – INFORMATION ON BIDDERS**

Bidders must provide the following information labelled as “Information on (Bidder Name)”;  

21.1 **Special purpose vehicle constitutional information**

A bidder must form a specific company, or special purpose vehicle (“SPV”), for the purposes of bidding for this PPP opportunity. Failure to do so may result in the bid being disqualified. The following must be specified:

21.1.1 The name, address, telephones and fax numbers of Bidder, and the trading name of the Bidder if different from the registered name.

21.1.2 Directors/Partners/Trustees and their responsibilities.

21.1.3 Place of registration.

21.1.4 Registration number.

21.1.5 Memorandum and Articles of Association (or equivalent constitutive documents).

21.1.6 Shareholders Agreement/Partnership or Joint Venture Agreement/Trust Deed.

21.1.7 Direct shareholder(s) joint venture, partner or beneficiary and percentage shareholding or other beneficial interest or participation held by each; if there is more than one class or share or funding the percentages held by each.

21.2 A letter confirming that the Bidder and each of its members has irrevocably waived any right it may have to seek and obtain a writ of injunction or prohibition or restraining order against SANParks to prevent or restrain the Tender or any proceedings related to it. However, such waiver shall be without prejudice to the right of a disqualified or losing Bidder to question the lawfulness of their disqualification or the rejection of its Bid by appropriate administrative or judicial processes not involving the issuance of a writ or injunction or prohibition or restraining order.
22. **SECTION 2 – FINANCING AND CAPITAL PLAN**

22.1 The Bidder should provide the following information:

22.1.1 Indicate how much capital will be needed, where it will come from (own capital, grants, loans) and the expected amount and terms (interest rate, repayment period, security) of any proposed loans. Specify whether the necessary financing has been secured, and provide appropriate proof;

22.1.2 A recent auditor’s report confirming that all the members of the bidder are solvent and liquid; if a member of the bidder does not produce audited financial statements, it must produce a notarised statement of assets; and

22.1.3 A cash flow forecast (net of VAT) for the proposed term (number of years) of the PPP agreement. This may be in a spreadsheet format of the bidder’s choice, but must at least present the following:

<table>
<thead>
<tr>
<th>Start-up</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5*</th>
</tr>
</thead>
<tbody>
<tr>
<td>R'000</td>
<td>R'000</td>
<td>R'000</td>
<td>R'000</td>
<td>R'000</td>
<td>R'000</td>
</tr>
</tbody>
</table>

**Cash inflows**
- Owners’ capital
- Loans received
- Grants received
- Cash from sales and other operating revenue
- Cash from other sources
  - Total cash inflow (A)

**Cash outflows**
- Project costs and start-up expenses
- Salaries, wages and staff costs
- All other operating costs and expenses
- Loan repayments
- Infrastructure upgrades/Building additions/ internal décor etc.
22.1.4 The cash flow forecast should include the following plan:

22.1.4.1 Courses to be presented

22.1.4.2 Target audience

22.1.4.3 Rate per specific course

22.1.4.4 # of trainees / year

22.1.4.5 Profitability per course

PLUS

22.1.4.6 Indicate pro bono / funded from the above courses (environmental education to community schools) and shown as an expense to the above. Also include income through donations, CSI initiatives, sponsorships, etc in the cash flow forecast

22.1.4.7 Outline the planned combined bottom line
23. SECTION 3 – BUSINESS OPERATIONAL AND DESIGN PLAN

Bidders should provide the following information, with back-up evidence where possible.

23.1 Background of Bidding Company (Weight 25%)

23.1.1 Rationale

23.1.1.1 The bidder’s objectives, the company, the concept and product and service to be offered

23.1.2 Current Operations

23.1.2.1 Size of current operations i.e. number of training centres / eco-schools

23.1.2.2 Number of people trained per annum with specific reference to the variety of courses conducted and how this caters for specific training needs

23.1.2.3 Type of operation and similarity to the PPP opportunity – detail to be outlined

23.1.3 Track Record

23.1.3.1 The bidder’s track record on and knowledge of existing products or activities offered in the industry

23.1.3.2 Outline the number of students trained and qualifications awarded per annum over the last 5 years

23.1.3.3 Memberships and registrations (list any awards, accolades or ratings)

23.1.3.4 Outline how different markets are catered for, i.e. ranger training versus environmental training versus training of school children versus community training on conservation ethics

23.1.4 Operating standards

23.1.4.1 Current operating standards, including an outline of any operations and procedures manuals

23.1.4.2 Outline the curriculum of various training courses and supply at least one training manual / text book
23.1.5 Management/Employees

23.1.5.1 Current company structure with specific reference to the expertise required for the relevant PPP Opportunity

23.1.5.2 Number of personnel and their qualifications

23.1.5.3 Curriculum vitae of shareholders, directors, management and staff

23.1.5.4 Where skills and experience are lacking, outline the strategy to in source these skills

23.2 Operational Vision, Plan and Service Standards (Weight 35%)

23.2.1 Products/Activities

23.2.1.1 Give an undertaking that the Phabeni Education Centre will become operational even if the 80 hectare area is not used

23.2.1.2 Give an undertaking that the Education Centre will be named the Kruger Environmental Education Centre and that the Trade Mark will vest with SANParks even after termination of the PPP Agreement

23.2.1.3 Give an undertaking that the Kruger Environmental Education Centre will be accredited as a lawful education centre

23.2.1.4 Outline how the Phabeni Education centre will be optimised

23.2.1.5 Detailed description of products or activities envisaged for the Phabeni Education Centre. Provide detail on the following:

23.2.1.5.1 Show how your products / training courses / environmental education and/or activities presented will provide a transformative learning experience that builds a passion for the conservation of the environment;

23.2.1.5.2 Show how your products / training courses / environmental education and/or activities will create awareness of the environment and importance of looking after the environment;

23.2.1.5.3 Show how your products / training courses / environmental education and/or activities will help to change attitudes / perceptions and built ambassadors for nature; and
23.2.1.5.4 Show how your products / training courses / environmental education and/or activities will help to build relationships (specific emphasis should be placed on initiatives to involve rich and poor community and create meaningful, mutually beneficial partnerships between these communities.

23.2.2 Design of Phabeni Education Centre

23.2.2.1 Outline changes to the existing infrastructure to optimise stay at the centre for diversity of courses / markets (current dormitory style accommodation might not be suitable for all delegates)

23.2.2.2 Design of the larger area (within the 80 hectares) to optimise the training and the experience

23.2.2.3 Outline how the design of the greater area will enhance and attract a wider market

23.2.2.4 Outline how the area will be used to optimise the opportunity for spiritual connectedness in nature and to create immersive life changing experiences.

23.2.3 Curriculum design

23.2.3.1 Provide an example where you have taken a current environmental challenge and tailored a solution into the curriculum in order to solve the challenge

23.2.3.2 Provide a table that outlines the full spectrum of services that will be offered:

23.2.3.2.1 Target market

23.2.3.2.2 Subjects covered

23.2.3.2.3 Practical activities

23.2.3.2.4 Timeframe

23.2.3.2.5 Duration
23.2.3.2.6  Cost

23.2.3.3 In addition, outline areas that will be developed in order to reach a wider audience.

23.2.3.4 Give an undertaking to work with SANParks to optimise/develop the lesson plans/curriculum/education materials for a variety of groups i.e. 0 to 5 years, 6 to 9 years, 10 to 12 years, 13 to 15 years and 16 to 18 years – confined to the 109 days allocated to environmental education of the SANParks target group.

23.2.3.5 Where children are too young, i.e. 0-5 years, outline the plan to reach out to these children and to teach them about nature.

23.2.4  Monitor and evaluation

23.2.4.1 Outline objectives that will be set together with impacts to be assessed.

23.2.4.2 Outline your plan to monitor and evaluate children that attend environmental education at the centre; and

23.2.4.3 Outline your plan to monitor and evaluate children that attended environmental education at the centre with specific reference to how this will be done after they left the centre (follow up).

23.2.5  Pro bono / subsidised Environment Education planning

23.2.5.1 # of days that training is given to underprivileged children. SANParks requires that an undertaking be given for under privileged children to be trained for 30% of available days during the year equating to 109 days.

23.2.5.2 Outline initiatives to source funds to train the children – donations, CSI initiatives, sponsorships, subsidising from other courses, etc.

23.2.5.3 Provide a clear plan on which schools will be targeted and what initiatives will be taken to ensure that they attend i.e. transport plan, interaction with the Education Department, communication with the schools, etc.

23.2.6  Menu design

23.2.6.1 It is understood that different training courses will result in different menus for attendees. Indicate how this will differ, i.e. provide menu layouts for children groups versus guide training versus educational training for
tourists who pays a premium to do a conservation course

23.2.6.2 Outline how different religions and preferences will be catered for, i.e. variety – vegetarian/non vegetarian, Health Options, Halaal, etc

23.2.7 Food preparation

23.2.7.1 Undertaking to have unannounced hygiene audits conducted at least once a year to ensure that good practices are implemented

23.2.7.2 Outline the quality of chefs / personnel that will be employed to ensure food quality is high and food is safe

23.2.7.3 Provide examples of menus offered during existing training courses

23.2.8 Proposed organisational and staffing structures, including:

23.2.8.1 An undertaking that staff working at the centre will be taken over in line with Section 197 of the Labour Relations Act.

23.2.8.2 Labour plan, including details of numbers of permanent and part-time staff that will be employed, staff recruitment policies, employment policies and socio-economic goals with employment

23.2.8.3 Management policies

23.2.8.4 Disciplinary Procedures

23.2.8.5 Staff Transport (due to the location of the Phabeni Education Centre within the Kruger National Park it is imperative that the bidder show how the staff will get to and from the centre

23.2.8.6 The Private Party should give an undertaking that all educators and staff who will be responsible to work and interact with the children will be cleared by the South African Police Service as having no record that could be to the detriment of the children

23.2.9 Customer Service

23.2.9.1 Outline supporting structures / systems to ensure that students are able to book for requested courses

23.2.9.1.1 Show existing structure / systems that will allow for this process to happen
23.2.9.1.2 Indicate what functionality will be put in place to get feedback on courses and presenters following conclusion of a course

23.2.10 Proposed Health & Safety

23.2.10.1 Hygiene Policies
23.2.10.2 Emergency evacuation plans
23.2.10.3 Waste Management / Recycling
23.2.10.4 Extraction Cleaning Processes (where applicable)
23.2.10.5 Other health and safety initiatives that will be implemented to ensure that the operation function well and in line with the law / rules / regulations
23.2.10.6 Operational Procedure
23.2.10.7 Cleaning procedures
23.2.10.8 Preventative measures, i.e. measures that will be implemented to prevent snake bites, abuse of children by staff members, etc.

23.2.11 Proposed Distribution Channels

23.2.11.1 Optimal use of local service providers (local defined as within 50 km from the border closest to the opportunity) – for areas such as catering supplies, hygiene services and housekeeping.
23.2.11.2 Logistical planning of all course materials as well as catering requirements
23.2.11.3 Stock storage and rotation procedures
23.2.11.4 Stock control measures

23.2.12 Branding

23.2.12.1 Outline branding plan and how the SANParks brand will be optimised at the operation.

23.2.13 Systems, Procedures and Policies

23.2.13.1 Guest Payment, Cash-up and Banking procedures
23.2.13.2 IT Operating Systems
23.2.13.3 Procurement Policies – Supply Chain

23.3 Institutional Depth to sell the Product (Weight 20%)

23.3.1 Marketing of training courses / how will delegates be attracted

23.3.1.1 Bidders existing client base and market penetration

23.3.1.2 Indicate existing relationships within the market that could assist to attract customers to the center i.e. with tour operators and travel trade (include references)

23.3.1.3 Current marketing programs and channels

23.3.1.4 Data Base Management

23.3.1.5 Outline your strategy to ensure that the Education center is optimally utilised

23.3.1.6 Indicate initiatives that will be launched to involve local communities and children at the center despite a lack of funding / resources from there side

23.3.2 Understanding of the market for this opportunity

23.3.2.1 Outline your understanding of the market with specific reference to differentiation, requirements, pricing range, skills requirements (in the market), etc.

23.3.2.2 Outline how your training courses have changed / developed over time to cater for this niche market. In addition give an undertaking to continue to look at gaps in the market and develop material to cater for these gaps

23.4 Enterprise Development (Weight 20%)

23.4.1 The Private Party will be required to implement a minimum of four (4) enterprise development programs over the duration of the contract term distributed evenly over the period. An undertaking should be given that this will be done.

23.4.2 The Private Party is to compile a plan which would outline the detail on how the enterprise development will be done and how this enterprise development will evolve into supplier development.

It is integral that the plans proposed as part of the bid submission be backed by
thorough research with clear targets that would be met. Failure to meet these and the condition set out in 23.4.1 will be seen as a material breach of the contract which could lead to termination.
24. **SECTION 4 – ENVIRONMENTAL PROPOSAL**

24.1 **Scoring**

In the bids the Environmental Plan comprises of 20% of the Functionality score with Functionality comprising 60% of the total score.

24.2 **Environmental responsibility:**

24.2.1 The Private Party acknowledges that SANParks has an active role to play in Responsible Tourism and expects the same from Private Parties that operates in National Parks. SANParks subscribes to the minimum standard of Responsible Tourism (SANS 1162) and expects the same from Private Parties that operates commercial outlets in National Parks.

24.2.2 Undertaking from the Private Party to conduct, manage and carry out the Project at all times in an Environmentally responsible way by adopting appropriate operating methods and practices for conducting such a Project in a proclaimed National Park.

24.2.3 The Private Party undertakes to take all reasonable steps in conducting of the Project to prevent and limit the occurrence of any Environmental or health hazards and to ensure the health and safety of the Private Parties and the public.

24.3 **Regulatory Provisions**

24.3.1 The Private Party undertakes to adhere to the Regulatory Provisions and the Environmental Specifications.

24.3.2 The Private Party undertakes to comply with its statutory duties in terms of the Environmental Laws and to take reasonable measures to prevent pollution or degradation from occurring, continuing or recurring or, in so far as such harm to the Environment is authorized by SANParks, to minimize and rectify such pollution or degradation of the Environment.

24.3.3 The Private Party undertakes to comply at all times with the provisions of the
Environmental Guidelines.

24.3.4 The Private Party acknowledges that the terms and conditions set forth in the Environmental Guidelines are subject to amendment.

24.3.5 The Private Party undertakes to comply with amended Environmental Guidelines.

24.4 **Environmental Impact**

24.4.1 Confirmation that all legislative requirements including Environmental Impact Assessment (EIA) or Basic Assessment (BA) requirements are understood and will be complied with.

24.4.2 The Private Party undertakes to bring to the attention of SANParks any matter which may, in its view, have a detrimental impact on the Environment within Selati Precinct Area and the Protected Area.

24.4.3 Where fish might for part of the menu, the operator needs to subscribe to the South African Seafood Initiative (SASSI) and only sell fish with green status or SASSI certified.

24.4.4 Where activities introduced within the greater Phabeni Education Centre area i.e. Mountain bike trails has a negative effect on the environment, i.e. erosion, the Private Party undertakes to correct these at their own cost in line with recommendations made by the Environmental Control Officer (ECO).

24.5 **Code of Conduct**

24.5.1 The Private Party undertakes to induct all staff employed on the Kruger National Parks' Code of Conduct.

24.5.2 The Private Party confirms that the Code of Conduct is understood and will be complied with.

24.6 **Solid Waste Management:**
24.6.1 The Private Party undertakes to manage all waste that is generated in such a way that direct and indirect impacts are kept to a minimum.

24.6.2 The Private Party undertakes to achieve Solid Waste Management Best Practices which implies the following:

24.6.2.1 Manage solid waste from source to disposal (use of green bags for recycle waste and black bags for non-recycle waste as per KNP Waste management system);

24.6.2.2 Strive to eliminate non-recyclable or hazardous packaging or containers at the procurement phase;

24.6.3 The Private Party undertakes to include the following policies in the waste management:

24.6.3.1 Green Procurement Policy: This policy defines the procedures that the Private Party will implement to ensure that all produce, containers and packaging comes from suppliers that under-write environmental principles, and that waste be recyclable as far as possible;

24.6.3.2 Hazardous Waste Policy: The Hazardous Waste Policy defines procedures that the Private Party will implement to manage any hazardous waste, to ensure that it is firstly minimized, but also that it is stored and discarded in a safe and legal way.

24.6.4 The Private Party will follow the following guidelines to minimize the effect of the solid waste on the ecosystem:

24.6.4.1 Minimize solid waste production at all sources, by striving for the minimization of all waste.

24.6.4.2 Maximize the recycling of solid waste. Glass, tin, paper and cardboard must be sorted on site for recycling, while actual recycling will take place off site at the approved camp waste disposal site.

24.6.4.3 All waste must be removed to the respective approved camp waste disposal site and incinerator for disposal and recycling. The dumping and disposal of waste other than at the approved waste site is strictly prohibited and failure to comply may result in termination.

24.6.4.4 Waste storage and sorting areas must be properly constructed and
maintained. Back-of-house waste cages and waste storage areas must remain clean and secure from problem animals.

24.6.4.5 Waste storage areas must remain visually hidden from visitors to the park.

24.6.4.6 Packaging and containers given to visitors to the park must be environmentally friendly, biodegradable and recyclable. Where water is provided as part of the courses, this should be in glass containers that can be refilled at a central point. Use of plastic water bottles are discouraged.

24.6.4.7 The distribution of plastic bags to visitors is strictly prohibited and only brown paper bags are allowed to be given for the purpose of carrying items purchased.

24.6.4.8 In terms of packaging the Private Operator undertakes to not use the following in outside seating areas such as the dining area within the Phabeni Education Centre:

24.6.4.8.1 Sachets (for sugar, tomato sauce, salt and pepper, etc.);
24.6.4.8.2 Paper serviettes; and
24.6.4.8.3 Butter tubs/pads

24.6.4.9 Ensure that the all areas are kept free of litter by:

24.6.4.9.1 Promoting an ethic amongst guests and staff alike.
24.6.4.9.2 Soliciting the co-operation of all staff to pick up litter wherever they find it.

24.7 **Liquid Waste Management:**

24.7.1 Liquid waste refers to sewerage as well as grey water;

24.7.2 The Private Party undertakes to manage liquid waste in accordance with national and local legislation requirements;

24.7.3 The Private Party undertakes to not dispose any liquid waste onto the tracks but to install chemical holding tanks onto the train to retain the water and human waste until removed through accepted methods;

24.7.4 The Private Party undertakes to design management techniques to be both economically viable and environmentally sustainable;
24.7.5 The Private Party undertakes to implement waste procedures that optimize the principles of waste reduction and waste recycling and ensures that the end product do not pollute the environment;

24.7.6 The Private Party undertakes to install a grease tap for:

24.7.6.1 Pot and Rinse Sinks attached to Dish Washers;
24.7.6.2 Fixtures or drains through which significant amount of fats, oils or grease may be introduced;
24.7.6.3 Soup Kettles or similar devices;
24.7.6.4 All sinks that are used to clean any dishes, pots, pans or cooking utensils.

24.7.7 The Private Party undertakes to implement processes and procedures which stipulates the following:

24.7.7.1 Kitchen staff should inspect grease traps and interceptors at least monthly and maintain a log sheet of each trap inspection detailing condition of the trap and any maintenance activity;
24.7.7.2 that grease traps are cleaned when 25% of the liquid level of the trap is grease or oil; and
24.7.7.3 That waste recovered from the grease traps be removed from the park and disposed of at an authorized facility.

24.8 Water Management and guidelines:

24.8.1 The Private Party undertakes to implement water conservation measures in the design and implementation of their operations;

24.8.2 The Private Party undertakes to:

24.8.2.1 Monitor the use of water;
24.8.2.2 Educate staff and trainees via on-site notices on the use of water;
24.8.2.3 Set water usage targets (monitored weekly/monthly) and manage these targets
24.8.2.4 Aim to avoid accidental loss through effective maintenance, installing quality storage and reticulation systems and implementing leak detection
systems.

Note: KNP will install bulk water meters and the Private Party to pay for the water use in accordance with the rate as included in the latest approved tariff document.

24.9 Chemical substances

24.9.1 The Private Party (including staff of the Private Party) undertakes to not sell or use any of the chemicals that are banned from use in National Parks (as determined by any Environmental Manager in National Parks);

24.9.2 The Private Party acknowledges that all chemicals listed as “Prohibited” may not be brought into, sold or used in any National Park. The products include items such as Rattex, Finale, Dyant, Doom and Target (an extensive list is available from the Project Officer);

24.9.3 The Private Party undertakes to ensure safe storage and disposal of chemicals and their containers;

24.9.4 The Private Party undertakes to have a specific disposal system for toxic or other waster regarded as being dangerous under supervision of the Technical Services Department;

24.9.5 The Private Party undertakes to use environmentally friendly and biodegradable detergents and cleaning agents;

24.10 Pest Control

24.10.1 The Private Party undertakes to comply with the integrated pest management plan as provided by SANParks;

24.10.2 Where and if required the Private Party undertakes to control bats as outlined in the SANParks Bat Management Plan;

24.10.3 The Private Party undertakes to make use of preferred pest control chemicals as outlined in the SANParks Pest Control Report.
24.11 **Visual Impacts**

24.11.1 Describe building materials to be used (where applicable) for all structures and obtain approval from SANParks where appropriate;

24.11.2 Describe efforts to minimise the visual impacts of the development, including lighting;

24.11.3 Provide locations of lightning arrestors and radio masts (where applicable) and how the visual impacts of these will be minimised;

24.11.4 Specifically outline how signage and colors will be mitigated to complement the environment; and

24.11.5 The Private Party undertakes to implement mitigation measures in order to reduce the visual impact in the park.

24.12 **Monitoring**

24.12.1 The Private Party agrees to cooperate with SANParks in compiling a monitoring checklist that encompasses all environmental conditions. The checklist would be used for auditing purposes and would be conducted once every 6 months; and

24.12.2 The Private Party agrees that SANParks will monitor, evaluate and score the operations (based on the line items in the checklist) and that a score of less than 85% for three (3) consecutive audits would imply material breach of the PPP Agreement.

24.13 **Energy use**

24.13.1 The Private Operator undertakes to measure energy use and continuously aim to implement measures to reduce energy usage until optimal levels are reached.
25. SECTION 5 – RISK MATRIX

<table>
<thead>
<tr>
<th>Type of risk</th>
<th>General description of risk</th>
<th>Project-specific risk</th>
<th>Mitigation measures</th>
<th>Allocation of risk (SANParks/ private party/ shared)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Availability risk</td>
<td>The possibility that the service provided by the Private Parties do not meet the output specifications</td>
<td></td>
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<tr>
<td>Construction completion risk</td>
<td>The risk that the construction of the physical asset is not completed on time</td>
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<tr>
<td>Cost over-run risk</td>
<td>The possibility that during the design and construction phase, the actual project costs will exceed projected costs</td>
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<tr>
<td>Design risk</td>
<td>The possibility that the Private Party’s design may not achieve the required output specifications</td>
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<tr>
<td>EIA Risk</td>
<td>The risk that the consent required from the DEA is not obtained to continue with the construction of the project</td>
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<td></td>
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</tr>
<tr>
<td>Environmental risk</td>
<td>The risk of liability for losses caused by environmental damage arising during the construction and operational phases of the project</td>
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<tr>
<td>Exchange rate risk</td>
<td>The possibility that exchange rate fluctuations will impact on the affordability of the project</td>
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</tr>
<tr>
<td>Financing</td>
<td>The risk that the required capital for capex and opex may not be able to raised; loans may not be able to be repaid; tax obligations may not have been fully taken into account or may change; fluctuating inflation, interest rates, and currencies may affect assumptions</td>
<td></td>
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<tr>
<td>Force Majeure risks</td>
<td>The possibility that the occurrence of unexpected events beyond the control of either parties effect the operation of the project</td>
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<tr>
<td>Inflation risk</td>
<td>The possibility that the actual inflation rate may exceed the projected inflation rate</td>
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<tr>
<td>Insurance risk</td>
<td>The risk of substantial increases in insurance premiums and/or costs related to excess payments</td>
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<td></td>
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</tr>
<tr>
<td>Type of risk</td>
<td>General description of risk</td>
<td>Project-specific risk</td>
<td>Mitigation measures</td>
<td>Allocation of risk (SANParks/ private party/shared)</td>
</tr>
<tr>
<td>----------------------------------</td>
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<tr>
<td>Insolvency risk</td>
<td>The possibility of insolvency of a Private Party</td>
<td></td>
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<tr>
<td>Interest rate risk</td>
<td>The possibility of interest rate fluctuations affecting the availability and cost of funding</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Maintenance risk</td>
<td>The possibility that the cost of maintenance exceeds the projected maintenance costs</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Market, demand or volume risk</td>
<td>The possibility that the demand for the service generated by the project may be less than anticipated</td>
<td></td>
<td></td>
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<tr>
<td>Operating risk</td>
<td>Factors impacting on the operating requirements of the project and related expenditure</td>
<td></td>
<td></td>
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<tr>
<td>Political risk</td>
<td>The possibility of unforeseeable conduct by SANParks or expropriation of the assets</td>
<td></td>
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<tr>
<td>Subcontractor risk</td>
<td>The risk of subcontractor defaults or insolvency</td>
<td></td>
<td></td>
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<tr>
<td>Resource or input risk</td>
<td>The possibility of a failure or shortage in the supply of resources</td>
<td></td>
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<tr>
<td>Tax rate change risk</td>
<td>The possibility that changes in applicable tax laws decrease the anticipated return on investment</td>
<td></td>
<td></td>
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<tr>
<td>Third Party claims</td>
<td>The risk of injury or death of trainees whilst attending a course at the Education centre</td>
<td></td>
<td></td>
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<tr>
<td>Utilities risk</td>
<td>The possibility that the utilities used exceed planned usage with associated increased cost</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Safety and security risk</td>
<td>Safety and security risks of all people attending environmental education or training at the centre</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
26. **SECTION 6 – B-BBEE PROPOSAL**

Bidders should provide the following information, with back-up evidence wherever possible.

26.1 **Commitments and Scoring**

Make commitments in the ‘bid offered’ column in the B-BBEE scorecard below. SANParks will provide the scoring on the basis of supporting information provided, and may use an accredited B-BBEE rating agency for this purpose.

In addition, in keeping with SANParks’ objectives, particular attention will be paid to the implementation of broad-based Black Economic Empowerment ("B-BBEE"), particularly those from local communities adjacent to the Parks. In this regard, SANParks will require that Interested Parties confirm their willingness to promote B-BBEE by entering into an agreement with a local community trust partner, who is entitled to a minimum of 10% shareholding in the Special Purpose Vehicle (SPV) that must be established for the purpose of this PPP opportunity.

The bidder will be required to score a minimum of 80% on the BEE scorecard.

26.2 **Supporting information**

26.2.1 Bidders are responsible for providing information to support their commitments.

26.2.2 Provide names, B-BBEE credentials and contact details of black shareholders, black managers and black women managers.

26.2.3 Provide details of the Local Community Trust Ownership with names and contact details (where applicable).

26.2.4 Where possible, provide these details for black enterprises or black people targeted for subcontracting and procurement.

26.2.5 Give the actual anticipated number of jobs.

26.2.6 Bidders should provide a detailed Skills Development Plan referring to the
investment in skills development initiatives through both external training providers and the quantifiable costs of accredited internal training programmes.

26.3 SANParks will evaluate the bidder’s B-BBEE proposal and will allocate scores according to the methodology and weightings in the B-BBEE scorecard detailed below.

26.3.1 Bidders that anticipate that the SPV will qualify as a Large Enterprise, as defined by the *Amended Tourism Codes*, must complete the Large Enterprise Scorecard.

26.3.2 Bidders that anticipate that the SPV will qualify as a qualifying small enterprise (“QSE”), as defined by the *Amended Tourism Codes*, must complete the QSE Scorecard.

26.4 **B-BBEE Scorecard Definitions and Measurements**

26.4.1 All B-BBEE definitions used are consistent with those used in the Amended Tourism B-BBEE Sector Code, 2015 with the following additions, where applicable:

26.4.1.1 Community trust - A not-for-profit trust created in terms of applicable law by volunteer members for channeling the proceeds of various activities and investments for the common good of persons ordinarily resident within a specific town, village or settlement.

26.4.1.2 Local - A geographic area specified by SANParks, being either within a 50 km radius of the proposed project site or within a 30 km reach of the boundary of the Protected Area fence (but excluding boundaries to the neighbouring countries);

26.4.2 SANParks will evaluate the bidder’s B-BBEE proposal and will allocate scores according to the methodology and weightings based on the *Amended Tourism B-BBEE Sector Codes, 2015 Targets*.

26.4.3 All measurements of scores are calculated consistently with those used in the *Amended Tourism B-BBEE Sector Codes, 2015* with the following additions /
amendments, where applicable:

26.4.3.1 **Ownership:**

26.4.3.1.1 For the purposes of Measurement for Voting Rights and Economic Interest, *Local Community Trust* is an additional category of Participants of that entity who are Black People.

26.4.3.2 **Management Control:**

26.4.3.2.1 For the purposes of Management Control Indicators for Board Participation, *Local People* refers to the Voting Rights in the hands Black People from Local Communities.

26.4.3.2.2 For the purposes of Management Control Indicators, *Local People* refers to Black Employees from Local Communities for the relevant indicators.

26.4.3.2.3 For the purposes of *Local People and for Measurements of the “All Employees” Indicator* only, Black People or Black Employees is not subject to be proportioned based on the economically active population / demographic representation as defined in the Regulations of Employment Equity Act.

26.4.3.2.4 For clarity on the above, the following criteria for Large Enterprises are subject to the Measurements as per the *Amended Tourism Sector Codes, 2015*:

26.4.3.2.4.1 Black Employees in Senior Management as a percentage of all Senior Management;

26.4.3.2.4.2 Black Female Employees in Senior Management as a percentage of all Senior Management;

26.4.3.2.4.3 Black Employees in Middle Management as a percentage at all Middle Management;

26.4.3.2.4.4 Black Female Employees in Middle Management as a percentage of all Middle Management;

26.4.3.2.4.5 Black Employees in Junior Management as a percentage of all Junior Management; and

26.4.3.2.4.6 Black Female Employees in Junior Management as a percentage of all Junior Management.
26.4.3.3 **Enterprise and Supplier Development:**

For the purposes of Preferential Procurement, Supplier Development and Enterprise Development Indicators, *Local* refers to Black Owned Entities that have their main business address listed as from a relevant Local Community.

26.4.3.4 **Socio-economic Development:**

For the purposes of the Socio-economic Development Indicator, *Local* refers to Black Owned Entities that have their main business address listed as from a relevant Local Community.

26.5 **Large Enterprise Scorecard**

<table>
<thead>
<tr>
<th>Element</th>
<th>Element Weighting</th>
<th>Indicator</th>
<th>Measurement Category &amp; Criteria</th>
<th>Weighting Points</th>
<th>Compliance Targets</th>
<th>Bid Offered</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ownership</td>
<td>27</td>
<td>Voting Rights</td>
<td>Exercisable Voting Rights in the entity in the hands of Black People</td>
<td>3</td>
<td>30%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Exercisable Voting Rights in the entity in the hands of Black Women</td>
<td>2</td>
<td>15%</td>
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<tr>
<td></td>
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<td></td>
<td>Exercisable Voting Rights in the entity in the hands of a Local Community Trust</td>
<td>1</td>
<td>10%</td>
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<tr>
<td>Economic Interest</td>
<td></td>
<td></td>
<td>Economic Interest to which Black Shareholders are entitled</td>
<td>4</td>
<td>30%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Economic Interest to which Black women Shareholders are entitled</td>
<td>2</td>
<td>15%</td>
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<td></td>
<td>Economic Interest to which a Local Community Trust is entitled to</td>
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<td>10%</td>
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<tr>
<td></td>
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<td></td>
<td>Net Value</td>
<td>8</td>
<td>Subminimum 40%</td>
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<tr>
<td>Score out of 27</td>
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<tr>
<td>Management Control</td>
<td>19 (+2 Bonus)</td>
<td>Board Participation</td>
<td>Exercisable Voting Rights of Black Board Members as a percentage of all Board Members</td>
<td>1</td>
<td>50%</td>
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<tr>
<td></td>
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<td></td>
<td>Exercisable Voting Rights of Black Female Board Members as a percentage of all Board Members</td>
<td>0.5</td>
<td>30%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Exercisable Voting Rights of Local People who are Board Members as a percentage of all Board Members</td>
<td>0.5</td>
<td>20%</td>
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</tr>
<tr>
<td>Element</td>
<td>Element Weighting</td>
<td>Indicator</td>
<td>Measurement Category &amp; Criteria</td>
<td>Weighting</td>
<td>Compliance Targets</td>
<td>Bid Offered</td>
<td>Score</td>
</tr>
<tr>
<td>---------------------------------</td>
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<td>--------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Black Executive Directors</td>
<td></td>
<td></td>
<td>Black Executive Directors as a percentage of all Executive Directors</td>
<td>1</td>
<td>50%</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Black Female Executive Directors as a percentage of all Executive Directors</td>
<td>0.5</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Executive Management</td>
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<td></td>
<td>Black Executive Management as a percentage of all Other Executive Management</td>
<td>1</td>
<td>60%</td>
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<td></td>
<td></td>
<td>Black Female Executive Management as a percentage of all Other Executive Management</td>
<td>0.5</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior Management</td>
<td></td>
<td></td>
<td>Black Employees in Senior Management as a percentage of all Senior Management;</td>
<td>2</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Black Female Employees in Senior Management as a percentage of all Senior Management.</td>
<td>1</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Middle Management</td>
<td></td>
<td></td>
<td>Black Employees in Middle Management as a percentage at all Middle Management</td>
<td>1</td>
<td>75%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Black Female Employees in Middle Management as a percentage of all Middle Management</td>
<td>0.5</td>
<td>38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Local People in Senior / Middle Management as a percentage of all Senior and Middle Management</td>
<td>2</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Junior Management</td>
<td></td>
<td></td>
<td>Black Employees in Junior Management as a percentage of all Junior Management</td>
<td>0.5</td>
<td>80%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Black Female Employees in Junior Management as a percentage of all Junior Management</td>
<td>0.5</td>
<td>40%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Local People in Junior Management as a percentage of all Junior Management</td>
<td>0.5</td>
<td>45%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employees with disabilities</td>
<td></td>
<td></td>
<td>Black Employees with Disabilities as a percentage of all Employees</td>
<td>2</td>
<td>2%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Employees</td>
<td></td>
<td></td>
<td>Black Employees as a percentage of all Employees (excluding Board and Executive Management)</td>
<td>1</td>
<td>75%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Black Female Employees as a percentage of all Employees (excluding Board and Executive Management)</td>
<td>1</td>
<td>40%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Element</td>
<td>Element Weighting</td>
<td>Indicator</td>
<td>Measurement Category &amp; Criteria</td>
<td>Weighting</td>
<td>Compliance Targets</td>
<td>Bid Offered</td>
<td>Score</td>
</tr>
<tr>
<td>---------</td>
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<td>--------------------</td>
<td>------------</td>
<td>-------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Local People as a percentage of all Employees (excluding Board and Executive Management)</td>
<td>2</td>
<td>60%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bonus Points</td>
<td></td>
<td>BONUS: Number of Black Employees with Disabilities over and above the 2% target for Black Employees with Disabilities in terms of a percentage of all Employees</td>
<td>2</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skills Development (20 (+5 Bonus))</td>
<td></td>
<td>Skills Development Expenditure on Learning Programmes specified in the Learning Programme Matrix for Black People in any of the following three tourism sub-sectors as a percentage of Leviable Amount: - Accommodation; - Hospitality and related services; - Travel and related services</td>
<td>5</td>
<td>6%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learnerships, Apprenticeships, and Internships</td>
<td></td>
<td>Number of Black Employees participating in Learnerships, Apprenticeships and Internships paid for by the measured entity as a percentage of total Employees.</td>
<td>8</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Number of Black Unemployed Learners participating in Learnerships, Apprenticeships and Internships paid for by the measured entity as a percentage of number of total Employees.</td>
<td>4</td>
<td>3%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bonus Points</td>
<td></td>
<td>Number of Black People absorbed by the measured and/or industry entity at the end of the Learnerships/ internship or Apprenticeship programme.</td>
<td>5</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Score out of 19

Score out of 20
<table>
<thead>
<tr>
<th>Element</th>
<th>Element Weighting</th>
<th>Indicator</th>
<th>Measurement Category &amp; Criteria</th>
<th>Weighting</th>
<th>Compliance Targets</th>
<th>Bid Offered</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise and Supplier Development</td>
<td>40 (+ 2 Bonus)</td>
<td>Preferential Procurement</td>
<td>B-BBEE Procurement Spend from all Empowering Suppliers based on the B-BBEE Procurement Recognition Levels as a percentage of Total Measured Procurement Spend</td>
<td>5</td>
<td>80%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>B-BBEE Procurement Spend from all local Empowering Suppliers that are Qualifying Small Enterprises based on the applicable B-BBEE Procurement Recognition Levels as a percentage of Total Measured Procurement Spend</td>
<td>3</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>B-BBEE Procurement Spend from all local Exempted Micro Enterprises based on the applicable B-BBEE Procurement Recognition Levels as a percentage of Total Measured Procurement Spend</td>
<td>4</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>B-BBEE Procurement Spend from Empowering Suppliers that are at least 51% Black Owned based on the applicable B-BBEE Procurement Recognition Levels as a percentage of Total Measured Procurement Spend</td>
<td>9</td>
<td>40%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>B-BBEE Procurement Spend from Empowering Suppliers that are 30% Black Women Owned based on the applicable B-BBEE Procurement Recognition Levels as a percentage of Total Measured Procurement Spend</td>
<td>4</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier Development</td>
<td></td>
<td></td>
<td>Annual value of all qualifying Supplier Development contributions to local entities made by the measured entity as a percentage of the target</td>
<td>10</td>
<td>3% of NPAT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enterprise Development</td>
<td></td>
<td></td>
<td>Annual value of all qualifying Enterprise Development contributions and Sector Specific Contributions to local entities made by the measured entity as a percentage of the target</td>
<td>5</td>
<td>0.5% of NPAT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bonus Points</td>
<td></td>
<td></td>
<td>Bonus point for graduation of one or more qualifying Enterprise Development</td>
<td>1</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Element</td>
<td>Element Weighting</td>
<td>Indicator</td>
<td>Measurement Category &amp; Criteria</td>
<td>Weighting</td>
<td>Compliance Targets</td>
<td>Bid Offered</td>
<td>Score</td>
</tr>
<tr>
<td>---------</td>
<td>-----------------</td>
<td>----------</td>
<td>---------------------------------</td>
<td>-----------</td>
<td>-------------------</td>
<td>------------</td>
<td>-------</td>
</tr>
<tr>
<td>Socio-economic Development</td>
<td>5 (+3 Bonus)</td>
<td>Socio-economic Development</td>
<td>Annual value of all local Qualifying Socio-Economic Development contributions by the measured entity as a percentage of the target</td>
<td>5</td>
<td>1% of NPAT</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bonus Points</td>
<td>Status as TOMSA levy collector</td>
<td>3</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Total Points</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>111 (12 Bonus)</td>
<td>111 (12 Bonus)</td>
</tr>
<tr>
<td>Minimum Threshold</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>80</td>
</tr>
</tbody>
</table>

### 26.6 Qualifying Small Enterprise Scorecard

<table>
<thead>
<tr>
<th>Element</th>
<th>Element Weighting</th>
<th>Indicator</th>
<th>Measurement Category &amp; Criteria</th>
<th>Weighting</th>
<th>Compliance Targets</th>
<th>Bid Offered</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ownership</td>
<td>26</td>
<td>Voting Rights</td>
<td>Exercisable Voting Rights in the entity in the hands of Black People</td>
<td>3</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Exercisable Voting Rights in the entity in the hands of Black Women</td>
<td>2</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Exercisable Voting Rights in the entity in the hands of a Local Community Trust</td>
<td>2</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Economic Interest</td>
<td>Economic Interest to which Black Shareholders are entitled</td>
<td>5</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Economic Interest to which Black women Shareholders are entitled</td>
<td>3</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Economic Interest to which a Local Community Trust is entitled to</td>
<td>3</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Net Value</td>
<td></td>
<td>8</td>
<td>Subminimum 40%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Score out of 26
<table>
<thead>
<tr>
<th>Element</th>
<th>Element Weighting</th>
<th>Indicator</th>
<th>Measurement Category &amp; Criteria</th>
<th>Weighting Points</th>
<th>Compliance Targets</th>
<th>Bid Offered</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>15 (+2 Bonus)</td>
<td>Executive Management</td>
<td>Black representation at Executive Management</td>
<td>2</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Black Female representation at Executive Management</td>
<td>1</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Local People representation at Executive Management</td>
<td>1</td>
<td>20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Senior, Middle and Junior Management</td>
<td>Black representation at Senior, Middle and Junior management</td>
<td>4</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Black Female representation at Senior, Middle and Junior management</td>
<td>2</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Local People representation at Senior, Middle and Junior Management</td>
<td>2</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>All Employees</td>
<td>Black Employees as a percentage of all Employees (excluding Board and Executive Management)</td>
<td>1</td>
<td>75%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Black Female Employees as a percentage of all Employees (excluding Board and Executive Management)</td>
<td>1</td>
<td>40%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Local People as a percentage of all Employees (excluding Board and Executive Management)</td>
<td>1</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bonus Points</td>
<td>Number of Black Employees with Disabilities as a percentage of all Employees</td>
<td>2</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Skills Development</td>
<td>25 (+5 Bonus)</td>
<td>Skills Development</td>
<td>Skills Development Expenditure on Learning Programmes specified in the Learning Programme Matrix for Black People in any of the following three tourism sub-sectors as a percentage of Leviable Amount: - Accommodation; - Hospitality and related services; - Travel and related services</td>
<td>10</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Score out of 15
<table>
<thead>
<tr>
<th>Element</th>
<th>Element Weighting</th>
<th>Indicator</th>
<th>Measurement Category &amp; Criteria</th>
<th>Weighting Points</th>
<th>Compliance Targets</th>
<th>Bid Offered</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Skills Development Expenditure on Learning Programmes specified in the Learning Programme Matrix for Black People with Disabilities in any of the above three tourism sub-sectors as a percentage of Leviable Amount.</td>
<td>9</td>
<td>1.5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learnerships, Apprenticeships, and Internships</td>
<td></td>
<td>Number of Black People participating in Learnerships, Apprenticeships and Internships paid for by the measured entity as a percentage of total Employees.</td>
<td>6</td>
<td>2.5%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bonus Points</td>
<td></td>
<td>Number of Black People absorbed by the measured and/or industry entity at the end of the Learnerships/ internship or Apprenticeship programme.</td>
<td>5</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Score out of 25</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enterprise and Supplier Development</td>
<td>30</td>
<td>Preferential Procurement</td>
<td>B-BBEE Procurement Spend from all Empowering Suppliers based on the B-BBEE Procurement Recognition Levels as a percentage of Total Measured Procurement Spend</td>
<td>8</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>B-BBEE Procurement Spend from Empowering Suppliers that are at least 51% Black Owned based on the applicable B-BBEE Procurement Recognition Levels as a percentage of Total Measured Procurement Spend</td>
<td>5</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>B-BBEE Procurement Spend from all local Empowering Suppliers that are Exempted Micro Enterprises or Qualifying Small Enterprises based on the applicable B-BBEE Procurement Recognition Levels as a percentage of Total Measured Procurement Spend</td>
<td>5</td>
<td>15%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Supplier Development</td>
<td>Annual value of all qualifying Supplier Development contributions to local entities made by the measured entity as a percentage of the target</td>
<td>7</td>
<td>2% of NPAT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Element</td>
<td>Element Weighting</td>
<td>Indicator</td>
<td>Measurement Category &amp; Criteria</td>
<td>Weighting Points</td>
<td>Compliance Targets</td>
<td>Bid Offered</td>
<td>Score</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------</td>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>------------------</td>
<td>--------------------</td>
<td>-------------</td>
<td>-------</td>
</tr>
<tr>
<td>Enterprise Development</td>
<td></td>
<td>Enterprise Development</td>
<td>Annual value of all qualifying Enterprise Development contributions and Sector Specific Contributions to local entities made by the measured entity as a percentage of the target</td>
<td>5</td>
<td>1% of NPAT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Socio-economic Development</td>
<td>5 (+3 Bonus)</td>
<td>Socio-economic Development</td>
<td>Annual value of all local Qualifying Socio-Economic Development contributions by the measured entity as a percentage of the target</td>
<td>5</td>
<td>1% of NPAT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bonus Points</td>
<td></td>
<td>Status as TOMSA levy collector</td>
<td></td>
<td>3</td>
<td>Yes</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Score out of 30**

| Total Points                   | 101 (+10 Bonus)   | Score out of 101               | Minimum Threshold | 80               |

26.7 **Milestones and Targets Going Forward**

26.7.1 The B-BBEE Milestones and Targets for the duration of the PPP Term shall be determined by the restructured editions of the Tourism Charter and Scorecard as gazetted from time to time.

26.7.2 The milestones and targets of the Tourism B-BBEE Charter and Scorecard could thus be amended from time to time and the provisions of this Section and PPP Agreement would be modified accordingly. The Operator would receive notification of such amendments and be provided with a satisfactory remedy period to address the amendments.

26.8 **External B-BBEE Verification**

26.8.1 The Operator shall appoint a reputable external verification agency to determine the SPV’s B-BBEE status and a copy of such an independent verification certificate shall be provided to SANParks within 15 (fifteen days) after the end of each Project Year.
26.8.2 The B-BBEE Verification Certificate will categorise the SPV/s according to their contribution to B-BBEE.

26.8.3 In the event of default by the SPV/s to comply with this provisions and the default is not remedied before the expiry of the period referred to in the notice by SANParks, SANParks will have the right to terminate the PPP Agreement with immediate effect by written notice to the SPV/s.
27. **SECTION 7 – PPP FEE OFFER**

27.1 **Important note to Bidders**

27.1.1 Information on the PPP Fee Offer must be contained in Envelope 2 and is **not** to be submitted in Envelope 1 (with the functionality and BEE proposals).

27.1.2 Bidders must present the PPP Fee Offer in the form of a letter on the bidder’s letterhead as follows, inserting the bidder’s name and the percentage of gross revenue for the variable PPP bid as indicated:

27.2 **Form of Letter**

To: South African National Parks

[Name of bidder] hereby commits to pay to SANParks the higher of:

(a) the minimum PPP fee and

(b) the Variable PPP Fee, expressed as a percentage of aggregate gross revenue as defined in the PPP agreement for the relevant project year.

The minimum PPP fee which will be adjusted annually by CPIX is as follows:

<table>
<thead>
<tr>
<th>PHABENI EDUCATION CENTRE MINIMUM PPP FEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phabeni Education centre</td>
</tr>
<tr>
<td>Year 1 - 10</td>
</tr>
</tbody>
</table>

The Variable PPP Fee bid by [name of bidder] is ___________[percentage]% of gross revenue. [Name of bidder] hereby warrants that the committed minimum PPP fee and the Variable PPP Fee shall be included in the PPP agreement, if accepted by SANParks.

For indicative purposes only, our projection of fees payable to SANParks is:

<table>
<thead>
<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
<th>...</th>
<th>Year 10*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross revenue (net of VAT)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Percentage of gross revenue due as Variable PPP Fee (same for each year)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
PPP fee due
Minimum PPP fee or Variable PPP Fee, whichever is greater
* Adapt for the term of the PPP.

The person signing below is a duly authorised representative of the bidder with full power and authority to submit this financial offer and commit the bidder to its terms.

Signed: _____________________

Name: ______________________

Title: ________________________
28. SECTION 8 – PPP AGREEMENT

The PPP Agreement does not form part of the RFP but will be available on the SANParks website: [www.sanparks.org](http://www.sanparks.org).
29. **ANNEXURE 1 – BID COVER SHEETS**

Cover sheets which include the following information must be attached to each Envelope:

<table>
<thead>
<tr>
<th>Bid for the commercial use of the Phabeni Education Centre in the Kruger National Park through a PPP Agreement (ORIGINALS).</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ENVELOPE 1: TECHNICAL BIDS</strong></td>
</tr>
<tr>
<td>Name of bidder:</td>
</tr>
<tr>
<td>Postal address:</td>
</tr>
<tr>
<td>Street address:</td>
</tr>
<tr>
<td>Telephone:</td>
</tr>
<tr>
<td>Cell phone:</td>
</tr>
<tr>
<td>Fax:</td>
</tr>
<tr>
<td>Contact person:</td>
</tr>
<tr>
<td>Email address:</td>
</tr>
<tr>
<td>Signature of bidder:</td>
</tr>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>Capacity under which bid is signed:</td>
</tr>
</tbody>
</table>

*Signature of this document means that the bidder accepts the terms and conditions of this bid. Failure by the bidder to sign this form may disqualify the bid.*
Bid for the commercial use of the Phabeni Education Centre in the Kruger National Park through a PPP agreement.

ENVELOPE 2: PPP FEE OFFER AND BEE SUBMISSION

Name of bidder:
Postal address:
Street address:
Telephone:
Cell phone:
Fax:
Contact person:
Email address:
Signature of bidder:
Date:
Capacity under which bid is signed:

Signature of this document means that the bidder accepts the terms and conditions of this bid. Failure by the bidder to sign this form may disqualify the bid.
30. **ANNEXURE 2 - ACCEPTABLE WORDING OF BID AND DEVELOPMENT BOND**

To: South African National Parks

[Name of bidder] (“the bidder”) is to submit to SANParks a bid to enter into PPP agreement with SANParks for the purpose of the development and operation of the Phabeni Education Centre in the Kruger National Park;

And you require the bidder to include in the bid a bid bond for the amount of R 40,000 (Forty Thousand Rand);

And we have agreed to give you such a bid bond.

We hereby irrevocably and unconditionally undertake to pay you, upon your first written demand and without objection or argument, the sum of R 40,000 (Forty Thousand Rand), upon any or all of the following occurrences:

- any material misrepresentation made by the bidder in its bid submission or any other information and documentation submitted by it under the request for qualifications or the request for proposals;
- the withdrawal or modification of its bid during the period of bid validity;
- failure by the preferred bidder to furnish the required performance bond under the PPP agreement in accordance with the provisions of the PPP agreement.

This bid bond shall be valid until operation commences which should not be more than 18 months after the signature date.

This bid bond shall be governed by the laws of the Republic of South Africa.

**SIGNATURE AND SEAL**

Name of bank_________________

Address_________________

Date_________________

**Please note:** The Bid and Development Bond will be replaced by a Performance Bond once operation commences to the amount equal to R 120,000 (Vat excl) and will be increased yearly on 1 April with CPI.
31. **ANNEXURE 3 – ASSISTANCE TO BIDDERS**

31.1 Below is financing institutions and support organisations that could be approached about providing financial, technical and other assistance to Bidders.

31.2 Bidders are advised to make use of these financing institutions and support organisations while developing their bids.

31.3 **Financing Packages through State Institutions**

A number of financing packages are available through state institutions to support tourism development. Applications are evaluated on a case-by-case basis against the specific criteria of the various schemes. Among other things, an applicant must demonstrate its financial capacity to undertake the development, as well as its track record, operational capability and market presence. In many instances, criteria are also applied to promote black economic empowerment. The list below provides a quick overview of incentive and loan schemes available to prospective tourism investors and institutions initiating PPPs. It is not exhaustive and private parties should undertake their own research.

31.3.1 **Department of Trade and Industry investment grants**

There are three principal grants available from the Department of Trade and Industry (DTI) to support investment in new private sector tourism.

<table>
<thead>
<tr>
<th>Critical Infrastructure Programme</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provider</strong></td>
</tr>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td><strong>Who qualifies</strong></td>
</tr>
<tr>
<td><strong>Scale</strong></td>
</tr>
<tr>
<td><strong>Contact details</strong></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
### Foreign Investment Grant

<table>
<thead>
<tr>
<th>Provider</th>
<th>Department of Trade and Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Tax-free cash grant incentive</td>
</tr>
<tr>
<td>Who qualifies</td>
<td>Aims to encourage foreign entrepreneurs to invest in new manufacturing concerns in South Africa by compensating them for the qualifying costs of moving new machinery and equipment from abroad. The manufacturing and tourism sectors qualify. The condition for manufacturing is that the sub-sector not be over saturated in terms of a DTI evaluation.</td>
</tr>
<tr>
<td>Scale</td>
<td>Approved qualifying foreign entities may qualify for up to a maximum of R3 million. The grant is only available to new qualifying investments and is offered once only to any foreign single entity. The grant will be the lower of the actual cost or 15% of the value of new machinery and equipment relocated from abroad.</td>
</tr>
<tr>
<td>Contact details</td>
<td>DTI Customer Contact Centre: 0861 843 384 Email: <a href="mailto:contactus@thedti.gov.za">contactus@thedti.gov.za</a> Website: <a href="http://www.thedti.gov.za">www.thedti.gov.za</a></td>
</tr>
</tbody>
</table>

### 31.3.2 Concessionary loan finance

Concessionary loan finance for the tourism sector is available from the Industrial Development Corporation (IDC) and the Development Bank of South Africa (DBSA). Both institutions have dedicated capacity to deal with tourism applications.

<table>
<thead>
<tr>
<th>Provider</th>
<th>IDC Tourism Strategic Business Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Medium- to long-term loans, with 5–10 year repayment terms and variable interest rates. In unusual circumstances, may consider risk participation in the form of equity or quasi-equity (mainly for large-scale or special projects such as strategically important BEE ventures).</td>
</tr>
<tr>
<td>Who qualifies</td>
<td>Local and foreign investors, developing new or expanding their current tourism operations. Focus has traditionally been on tourism accommodation, but has recently broadened.</td>
</tr>
<tr>
<td>Details</td>
<td>Minimum loan size is R1-million. Minimum contribution of 40% required in owner’s equity, but less may be accepted from historically disadvantaged entrepreneurs. Interest rates vary but are linked to</td>
</tr>
</tbody>
</table>
prime and vary depending on the profile of the project. Under certain circumstances a small discount on prime may be negotiated. Repayments are tailored to suit cash flow requirements through capitalisation and moratoriums on capital repayments.

**Contact details**
Tel: 011 269-3472
Email: callcentre@idc.co.za Website: http://www.idc.co.za

**Development Bank of Southern Africa**

<table>
<thead>
<tr>
<th>Provider</th>
<th>Development Bank of Southern Africa (DBSA)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td>Medium- to long-term loans, with variable repayment terms and interest rates. May also consider equity participation and providing guarantees to leverage private sector support by reducing the perceived risk of investment. Mainly functions as a supply infrastructure funder, but will consider commercial infrastructure.</td>
</tr>
<tr>
<td><strong>Who qualifies</strong></td>
<td>Local investors developing new tourism infrastructure or expanding their current tourism operations.</td>
</tr>
<tr>
<td><strong>Details</strong></td>
<td>Significant owner’s equity (30%+) required. Capital grace period may be negotiated to accommodate cash flow needs during start-up period. Interest rates are linked to prime and vary depending on the profile of the project. Under certain circumstances a small discount on prime may be negotiated. Repayments are tailored to suit cash flow requirements through capitalisation and moratoriums on capital repayments.</td>
</tr>
<tr>
<td><strong>Contact details</strong></td>
<td>Tel: 011 313 3911 Fax: 011 313 3086 Website: <a href="http://www.dbsa.org">http://www.dbsa.org</a></td>
</tr>
</tbody>
</table>

### 31.3.3 Empowerment funds

These funds are to facilitate BEE in the tourism industry.

<table>
<thead>
<tr>
<th>Land Reform Credit Facility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provider</strong></td>
</tr>
<tr>
<td><strong>Type</strong></td>
</tr>
<tr>
<td><strong>Who qualifies</strong></td>
</tr>
<tr>
<td><strong>Details</strong></td>
</tr>
</tbody>
</table>
discounted interest rates wholesaled via the commercial banking sector. Applicants must approach a commercial bank with a viable business proposition. The bank then sources the funds from Khula at discounted rates and on-lends to the applicant. Khula has also administered equity grants matched to Land Reform Credit Facility (LRCF) loans. This means that projects with the right empowerment profile can source 50% of their capital funding via an LRCF loan and 50% via an equity grant.

| Contact details | Tel: 0860054852  
|                | Also have regional administration offices country wide  
|                | E-mail: [helpline@khula.org.za](mailto:helpline@khula.org.za)  
|                | Website: [http://www.khula.org.za](http://www.khula.org.za) |

### Credit guarantee

<table>
<thead>
<tr>
<th>Provider</th>
<th>Khula Finance Enterprise Ltd</th>
</tr>
</thead>
</table>

#### Details

Three schemes are available:

**The standard scheme** provides cover up to R1 million of the bank facility at 80%, with the fee payable at 3% per year in advance. The duration of the scheme is 36 months initially, but can be extended twice for periods of 12 months each time.

**The emerging entrepreneur scheme** provides up to R100 000 with the fee payable at 4% per year in advance. The duration is 24 months initially, but can be extended three times for periods of 12 months each time.

**The empowerment scheme** provides cover up to R5 million of bank facility at 60%, with the fee payable at 2.5% per year in advance. Duration is 36 months initially, but can be extended twice for a period of 12 months each time.

| Contact details | Tel : 0860054852  
|                | Also have regional administration offices country wide  
|                | E-mail:[helpline@khula.org.za](mailto:helpline@khula.org.za)  
|                | Website:[http://www.khula.org.za](http://www.khula.org.za) |

### Entrepreneur support

| Provider | National Empowerment Fund |
## Details

The National Empowerment Fund’s (NEF) entrepreneur support programme helps black enterprises expand and grow, and facilitates transformation in white-owned and operated enterprises. Targeted at SMMEs and provides a combination of debt and equity funding. The NEF seeks a commercial return on all finance supplied. Three products offered:
- **Generator** provides investment between R250 000 and R1 million for the creation of new black-owned businesses with the capacity to become sustainable SMMEs. 75% of the equity must be controlled by black people.
- **Accelerator** provides investment between R1 million and R3 million as expansion capital aimed at stimulating the growth of black-owned enterprises. 51% of the equity must be controlled by black people.
- **Transformer** provides between R3 million and R10 million towards the transformation of enterprises at the ownership, decision-making and control levels, and to encourage employee ownership of businesses. 26% of the equity must be controlled by black people.

## Community and rural development

**Provider**

National Empowerment Fund

**Details**

The community and rural development programme enables communities to acquire equity in an income-generating project that will result in social upliftment in historically marginalised economic areas. Support available to groups comprising black people. There must be a project champion and co-funding by other investors or financiers. Funding limited to the community investment portion of the project. Equity funding can be provided where investment ranges from R2 million to R10 million. Projects must be undertaken in conjunction with a partner recognised by the NEF. The project proposal must include detailed information on the business, owners, leadership and management before the NEF will meet the applicants. The NEF seeks a commercial return on all finance supplied.

**Contact details**

Tel: 011 305 8000 / 0861 843 633 Fax: 011 305 8001  
Email: [info2@nefcorp.co.za](mailto:info2@nefcorp.co.za)  Website: [www.nefcorp.co.za](http://www.nefcorp.co.za)  
Address: West Block, 187 Rivonia Road, Morningside, 2057  
Postal address: Box 31, Melrose Arch, 2076
### Youth development

<table>
<thead>
<tr>
<th>Provider</th>
<th>Umsombovu Youth Fund</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>The Umsombovu Youth Fund (UYF) supports youth development for sustainable livelihoods through two schemes: The Youth Entrepreneurship Programme provides access to finance and business development services for small businesses through two schemes: - Micro finance provides funding to unemployed, under-employed or self-employed youth to establish new businesses or expand existing businesses via two micro finance providers: the Nations Trust Youth Enterprise Finance Company, which provides loans up to R40 000 and Nicro Enterprise Finance for former prisoners. - SMME finance provides development capital funds aimed at increasing the number of black youth-owned and managed SMMEs. Through loans or equity. UYF has entered into joint ventures to create two separate development capital funds: FNB-Momentum-UYF Progress Fund and Umsombovu Youth Fund-Business Partners Franchise Fund. - The Business Development Services Voucher Programme gives entrepreneurs access to business services such as bookkeeping, marketing and developing business plans. Young entrepreneurs access the services through vouchers, which range in value from R1 500 to R23 000. Recipients themselves are required to make contributions on a progressive basis as they benefit from additional vouchers. A young person will pay 10% of the value of the first voucher received, 20% of the value of the second voucher, up to 40%.</td>
</tr>
</tbody>
</table>

### Contact details

<table>
<thead>
<tr>
<th>Tel: 011 651 7000 Fax: 011 8059709</th>
<th>Email: <a href="mailto:info@uyf.org.za">info@uyf.org.za</a> Website: <a href="http://www.uyf.org.za">www.uyf.org.za</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Address: Umsombovu House, 11 Broadwalk Avenue, Halfway House, Midrand</td>
<td>Postal address: PO Box 982, Halfway House, 1685</td>
</tr>
<tr>
<td>Regional Offices countrywide refer to website</td>
<td></td>
</tr>
</tbody>
</table>

### Black Business Supplier Development Programme

<table>
<thead>
<tr>
<th>Provider</th>
<th>Department of Trade and Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>The Black Business Supplier Development Programme (BBSDP) is</td>
</tr>
</tbody>
</table>
a cash grant incentive scheme that aims to fast track existing SMMEs that exhibit a good potential for growth into the mainstream formal economy and to foster linkages between black-owned SMMEs and corporate and public sector enterprises. Companies that qualify include majority black-owned companies (51% or more) with significant numbers of black managers. Grants are limited to companies with a maximum R12 million per year and which have been trading for a minimum of one year.

Cost sharing grant: Maximum grant is R100 000. A company may apply for multiple projects provided that the cumulative grants awarded do not exceed this sum. All business development costs including travel and subsistence qualify for cost sharing assistance. The grant supports projects that:
- improve effectiveness of management systems, for example, production planning and control systems, quality management systems
- impart specialised, enterprise-specific skills to employees, for example, specialised technical courses
- upgrade management capability, for example, executive and financial management programmes and seminars on preparation of bids for tenders
- assist the entry of a firm into targeted markets, for example, market research and the development of marketing plans, design and development of marketing materials, website design (limited support for printing marketing materials).

**Contact details**

| BBSDP Secretariat Tel 012 394-1444 Fax 012 394-1426 |
| DTI Customer Contact Centre: 0861 843 384 |
| email: contactus@thedti.gov.za Website: www.thedti.gov.za |

**Tourism Enterprise Programme**

| Provider | Tourism Enterprise Programme (managed by ECI Africa) |
| Details | The Tourism Enterprise Programme (TEP) is a joint initiative of the Business Trust and the Department of Environment Affairs and Tourism. TEP fosters viable business transactions between established industry players and SMMEs in the tourism sector. TEP can provide grants to support tourism SMMEs in: marketing assistance for events; development of business and marketing plans; preparation of and submission of tenders; training and skills |
development; attending exhibitions and conferences; and certification and licensing. Grants made on a cost-sharing basis, typically 50-50 but can be negotiated. Average grant is about R25 000. SMMEs that operate as tourism enterprises (for example lodge, hotel, B&B, tour guiding company) or SMMEs that are formal suppliers of goods and services which derive at least 50% of their income from tourism-related activities can apply. TEP will only support SMMEs that demonstrate a potential to grow and create jobs. TEP does not provide start-up costs, operational capital, or contributions to equity or infrastructure.

Contact details
Tel: 011 718-2000 Fax: 011 483-0049
Email: info@tep.co.za
Website: www.tep.co.za
Head Office Address: 53 Central Street, Houghton
Postal Address: PO BOX 1650, Houghton, 2041
TEP also has offices and management agencies in all provinces, details on website.

Business Partners
Provider | Business Partner Tourism Fund
Details | The Business Partner Tourism Fund is a R 200 million specialist investment fund that has been created to enable and empower entrepreneurs in the travel and tourism industry. Business Partners is South Africa’s leading investment company for small and medium enterprises and the fund offers qualifying entrepreneurs all the benefits of its infrastructure and expertise. Using an internationally-recognised investment model developed by the company, Business Partners provides integrated investment and added-value solutions for small and medium enterprises, from single-owned businesses to partnerships and multi-owner ventures. In consultation with the entrepreneur, an appropriate repayment period is established during the initial investment negotiations. This is usually five years and is never longer than 10 years. In some cases, the fund takes minority shareholding in the business for the duration of the repayment period, after which Business Partners may wish to sell its shares in the business at market value. The
entrepreneur is always offered the right of first refusal on these shares.

**Contact details**

Business Partners Centre – Tel 011 480-8700 Fax 642-2791
e-mail: enquiries@businesspartners.co.za
Website: www.businesspartners.co.za
Regional offices countrywide details on Website

### 31.3.4 Training grants and incentives

Various other forms of assistance are available, especially in the field of training and skills development:

<table>
<thead>
<tr>
<th>Skills Support Programme</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provider</strong></td>
</tr>
<tr>
<td><strong>Description</strong></td>
</tr>
</tbody>
</table>
| **Contact details** | DTI Customer Contact Centre: 0861 843 384 or Fax 0861 843 888
Email: contactus@thedti.gov.za
Website: www.thedti.gov.za
DTI Campus, 77 Meintjies Street, Sunnyside, Pretoria |

<table>
<thead>
<tr>
<th>Tourism, Hospitality and Sport Education and Training Authority</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Provider</strong></td>
</tr>
</tbody>
</table>
### Details

The Theta offers a range of support services as well as grants and levies to tourism operators. Also administers the National Skills Funding for the tourism sector. Two specialist programmes, the Tourism Learner ship Project and the Integrated Nature Tourism and Conservation programme, offer grants and levies to tourism enterprises.

The Theta aims to: develop worker skills; increase levels of investment in education and training; encourage employers to train their employees, provide opportunities for work experience and employ new staff; encourage workers to participate in learner ship and other training programmes; improve the employment prospects of disadvantaged people; ensure the quality of education and training in and for workplaces; assist work seekers to find work and employers to find qualified employees; and encourage providers to deliver education and training in and for the workplace.

### Contact details

Call Centre: 0860 100 221; Tel: 011 217-0600 Fax: 011 783-7745

Email: theta@theta.org.za

Address: 3rd Floor, Block E, Sandhurst Office Park, Cnr Rivonia & Katherine Street, Sandton

Postal address: PO Box 1329, Rivonia, 2128

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**31.3.5 Marketing support**

The DTI offers support for South African companies in the tourism (and other) sectors for activities aimed at developing export markets, attracting foreign tourists to the country, and recruiting foreign direct investment into South Africa.

### Export Marketing and Investment Assistance Scheme

<table>
<thead>
<tr>
<th>Provider</th>
<th>The Department of Trade and Industry via Trade and Industry South Africa (TISA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Details</td>
<td>The Export Marketing and Investment Assistance Scheme provides partial compensation to exporters for certain costs in developing export markets for South African products and recruiting new foreign direct investment, specifically: primary export market research; foreign direct investment research; exhibition assistance; outward investment recruitment missions; inward investment missions; primary market research; between 50% and 100% of cost of economy class return airfare; subsistence allowance for up to 15 days (weekends may be included depending on appointments) –</td>
</tr>
</tbody>
</table>
max R1 350 a day; marketing materials (designing and printing of export brochures, promotional video or CD) – max R10 000 a year. TISA will cover 80% of the cost of the following items to a maximum of R45 000: rental of exhibition space; construction of stand, excluding interior design; telephone installation, excluding phone calls; rental of essential furniture; listing in official exhibition directory; electrical costs; interpreting fees; cleaning and security fees.

<table>
<thead>
<tr>
<th>Contact details</th>
<th>DTI Customer Contact Centre: 0861 843 384</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Email: <a href="mailto:contactus@thedti.gov.za">contactus@thedti.gov.za</a></td>
</tr>
<tr>
<td></td>
<td>Website: <a href="http://www.thedti.gov.za">www.thedti.gov.za</a></td>
</tr>
</tbody>
</table>

### 31.3.6 Poverty relief funds

The Department of Tourism administers a number of poverty relief funds.

<table>
<thead>
<tr>
<th>Poverty Relief Programme</th>
<th>Department of Tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider</td>
<td></td>
</tr>
<tr>
<td>Details</td>
<td>The Poverty Relief Programme in the tourism and environment sectors has a special focus on infrastructure investment and product development (such as heritage sites, rock art and conservation) at emerging tourism growth points, and priorities such as transfrontier conservation areas. Aims to alleviate poverty through long-term sustainable work opportunities, using grant facilities: Sustainable Land Based Livelihoods includes funding of Working for Water, Working for Wetlands, Working for the Land, and Community Based Natural Resource Management programmes. Working for Tourism funds tourism enterprises that create jobs and benefit local communities. People and Parks focuses on projects that involve communities in conservation of protected areas and maximise benefits to the poor. Working for the Coast supports programmes that use coastal resources for the benefit of coastal communities. Working for Waste supports SMMEs involved in waste management and recycling. The programme also funds the purchase of community equity in tourism enterprises, especially those partnering with a private party. These grants include components for technical support.</td>
</tr>
</tbody>
</table>
Each poverty relief project must have an implementing agency (IA). Can be a government department, a municipality or local council, a non-governmental organisation (NGO), a community-based organisation (CBO) or a private company. Primary consideration is that the IA must be legally constituted, able to open a bank account, and have a history of sound financial management.

<table>
<thead>
<tr>
<th>Contact details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Poverty Relief Unit</td>
</tr>
<tr>
<td>Tel: 012 310 3837 Fax: 012 320 6906</td>
</tr>
<tr>
<td>Email: <a href="mailto:ndyantyi@deat.gov.za">ndyantyi@deat.gov.za</a></td>
</tr>
<tr>
<td>Website: <a href="http://www.deat.gov.za">www.deat.gov.za</a></td>
</tr>
<tr>
<td>Address: 15th Floor, Fedsure Forum, corner Pretorius and Van der Walt Streets, Pretoria</td>
</tr>
<tr>
<td>Postal address: Private Bag X447, Pretoria, 0001</td>
</tr>
</tbody>
</table>

31.4 Non-government Support Organisations

There are a number of skilled and experienced non-government organisations (NGOs) working in South Africa to support local economic development, poverty alleviation and the empowerment of the poor through tourism. They are able to assist and pass on skills to public institutions, community organisations, new black-owned enterprises and SMMEs at various stages of the PPP project cycle. Many are funded by aid agencies or philanthropic foundations and are thus able to provide support at low cost. By obtaining assistance from these NGOs, public institutions and private parties may reduce their reliance on consultants. Following is a list of some of these organisations. It is not exhaustive and private parties should undertake their own research.

<table>
<thead>
<tr>
<th>African Wildlife Foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type of work</strong></td>
</tr>
<tr>
<td><strong>Contact details</strong></td>
</tr>
<tr>
<td><strong>Business Linkages in Tourism</strong></td>
</tr>
<tr>
<td>----------------------------------</td>
</tr>
<tr>
<td><strong>Type of work</strong></td>
</tr>
</tbody>
</table>
| **Contact details** | Tel: 012 654 7525 Fax: 012 654 7349  
Email: bizlink@tbsca.org.za  
Address: 245 End Street, Clubview, Centurion  
Postal address: PO Box 11655, Clubview, 0157, Centurion |

<table>
<thead>
<tr>
<th><strong>ComMark Trust</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type of work</strong></td>
<td>Supports and promotes policy, institutional and operational initiatives to improve the operation of markets, including tourism markets, for the poor in Southern Africa. Identifies areas of market failure and supports measures to correct these in favour of the poor. Seeks to overcome barriers to entry for new businesses, facilitate linkages between large and small enterprises, and enable community PPPs.</td>
</tr>
</tbody>
</table>
| **Contact details** | Tel: 012 431 7900 Fax: 012 431 7910  
Email: commark@commark.org  
Website: [www.commark.org](http://www.commark.org)  
Address: 826 Government Avenue, Arcadia, 0083 |

<table>
<thead>
<tr>
<th><strong>Fair Trade in Tourism South Africa (FTTSA)</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type of work</strong></td>
<td>Encourages and publicises fair and responsible business practice by South African tourism establishments through the FTTSA trademark, an independent symbol of fairness in the tourism industry. The trademark is awarded to tourism establishments that meet stringent criteria including: fair wages and working conditions, fair operations, purchasing and distribution of benefits; ethical business practice; and respect for human rights, culture and the environment</td>
</tr>
</tbody>
</table>
| **Contact details** | Tel: 012 342 2945/3642 Fax: 012 342 2946  
Email: info@fairetourismsa.org.za  
Website: [www.fairetourismsa.org.za](http://www.fairetourismsa.org.za) |
| Address: 34A Hatfield Corner, 1270 Church Street, Colbyn, Pretoria  
Postal address: PO Box 12844, Queenswood, 0121 |

| **GTZ Transform** |
| **Type of work** | GTZ runs the Transform partnership programme with the Department of Environmental Affairs and Tourism and South African National Parks. Supports joint management of conservation, community-based natural resource management, and joint venture tourism in South Africa. Experience includes the Makuleke Region of the Kruger National Park, the Richtersveld, Riemvasmaak, the Blyde River Canyon in Mpumalanga, Maputaland in KwaZulu-Natal and the Wild Coast of the Eastern Cape. |
| **Contact details** | Tel: 012 342 3174 Fax: 012 342 3178  
Email: johannesbaumgart@gtz.de  
website: www.gtz.de |

| **Wildlands Conservation Trust** |
| **Type of work** | Promotes community-based conservation and partnerships in nature tourism in KwaZulu-Natal, Mpumalanga and Eastern Cape. Works closely with conservation agencies, local authorities and other public institutions. |
| **Contact details** | Tel: 033 343 6380 Fax: 033 343 1976  
Website: www.wildlands.co.za  
Postal address: PO Box 1138, Hilton, 3245 |

| **World Conservation Union (IUCN)** |
| **Type of work** | One of the world’s largest conservation organisations. Promotes nature tourism that alleviates poverty. Plays key role in people and parks conferences for organisations representing communities on the borders of protected areas. Focus areas: integration of human development and the environment, poverty alleviation and sustainable livelihoods. South Africa office: promotes conservation of biological diversity through the sustainable use of natural resources, facilitates resolution of resource-based conflicts, advocates for policy changes, promotes a participatory approach to community-based natural resource management and advocates for sustainable land use and effective environmental management. |
| Contact details | IUCN-ESARO - IUCN Regional Office for Eastern and Southern Africa  
Kenya  
Tel: ++254 (20) 890-606/07/08.../13  
Fax: ++254 (20) 890-615  
Email: earo@iucn.org  
www.iucn.org/esaro/ |