



social development

Department:
Social Development
REPUBLIC OF SOUTH AFRICA

Private Bag X901, Pretoria, 0001

Enquiries: A. Mbodla, Tel No: (012) 312 7653, Email: AndiswaM@dsd.gov.za

Sir/Madam

TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER OOF-SITE TRAVEL MANAGEMENT SERVICES TO THE DEPARTMENT OF SOCIAL DEVELOPMENT FOR A PERIOD OF 36 MONTHS.

1. Tender No: **SD03/2025**
2. Closing Date: 29 January 2026 at 11:00
3. Non-Compulsory virtual briefing 20 January 2026@11:00
4. The following documents form part of this invitation for a proposal:
 - SBD1: Invitation to bid
 - Terms of reference A1
 - Desktop Evaluation A2
 - SBD3.3: Pricing Schedule
 - Pricing submission A3
 - SBD4: Declaration of Interest
 - SBD6.1: Preference points Claim Form
5. **All the documents accompanying this invitation must please be completed in detail where applicable and returned with your Bid.**
6. Please make sure that your bid reaches this office before the closing time and date
7. When submitting your bid, the following information must appear on the sealed envelope:
 - i. Name and address of the Bidder
 - ii. Bid number
 - iii. Closing Date
8. This envelope can be placed in the Bid box in the foyer at HSRC Building, 134 Pretorius Street, Pretoria

Kind regards

DIRECTOR: SUPPLY CHAIN MANAGEMENT

DATE: 05/12/2025

PART A INVITATION TO BID

YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE (NAME OF DEPARTMENT/ PUBLIC ENTITY)									
BID NUMBER: SD03/2025		CLOSING DATE: 20 Jan 2026				CLOSING TIME: 11:00			
TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER OOF-SITE TRAVEL MANAGEMENT SERVICES TO THE DEPARTMENT OF SOCIAL DEVELOPMENT FOR A PERIOD OF 36 MONTHS									
DESCRIPTION: BID RESPONSE DOCUMENTS MAY BE DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)									
BIDDING PROCEDURE ENQUIRIES MAY BE DIRECTED TO					TECHNICAL ENQUIRIES MAY BE DIRECTED TO:				
CONTACT PERSON					CONTACT PERSON				
TELEPHONE NUMBER					TELEPHONE NUMBER				
FACSIMILE NUMBER					FACSIMILE NUMBER				
E-MAIL ADDRESS					E-MAIL ADDRESS				
SUPPLIER INFORMATION									
NAME OF BIDDER									
POSTAL ADDRESS									
STREET ADDRESS									
TELEPHONE NUMBER		CODE				NUMBER			
CELLPHONE NUMBER									
FACSIMILE NUMBER		CODE				NUMBER			
E-MAIL ADDRESS									
VAT REGISTRATION NUMBER									
SUPPLIER COMPLIANCE STATUS		TAX COMPLIANCE SYSTEM PIN:			OR	CENTRAL SUPPLIER DATABASE No:	MAAA		
B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE		[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No			B-BBEE STATUS LEVEL SWORN AFFIDAVIT			[TICK APPLICABLE BOX] <input type="checkbox"/> Yes <input type="checkbox"/> No	
[A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE/ SWORN AFFIDAVIT (FOR EMES & QSEs) MUST BE SUBMITTED IN ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE]									
ARE YOU THE ACCREDITED REPRESENTATIVE IN SOUTH AFRICA FOR THE GOODS /SERVICES /WORKS OFFERED?		<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES ENCLOSE PROOF]			ARE YOU A FOREIGN BASED SUPPLIER FOR THE GOODS /SERVICES /WORKS OFFERED?			<input type="checkbox"/> Yes <input type="checkbox"/> No [IF YES, ANSWER THE QUESTIONNAIRE BELOW]	
QUESTIONNAIRE TO BIDDING FOREIGN SUPPLIERS									
IS THE ENTITY A RESIDENT OF THE REPUBLIC OF SOUTH AFRICA (RSA)?									
DOES THE ENTITY HAVE A BRANCH IN THE RSA?									
DOES THE ENTITY HAVE A PERMANENT ESTABLISHMENT IN THE RSA?									
DOES THE ENTITY HAVE ANY SOURCE OF INCOME IN THE RSA?									
IS THE ENTITY LIABLE IN THE RSA FOR ANY FORM OF TAXATION?									
THE ANSWER IS "NO" TO ALL OF THE ABOVE, THEN IT IS NOT A REQUIREMENT TO REGISTER FOR A TAX COMPLIANCE STATUS SYSTEM PIN CODE FROM THE SOUTH AFRICAN REVENUE SERVICE (SARS) AND IF NOT REGISTER AS PER 2.3 BELOW.									

PART B TERMS AND CONDITIONS FOR BIDDING

1. BID SUBMISSION:

- 1.1. BIDS MUST BE DELIVERED BY THE STIPULATED TIME TO THE CORRECT ADDRESS. LATE BIDS WILL NOT BE ACCEPTED FOR CONSIDERATION.
- 1.2. ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS PROVIDED-(NOT TO BE RE-TYPED) OR IN THE MANNER PRESCRIBED IN THE BID DOCUMENT.
- 1.3. THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT, 2000 AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.
- 1.4. THE SUCCESSFUL BIDDER WILL BE REQUIRED TO FILL IN AND SIGN A WRITTEN CONTRACT FORM (SBD7).

2. TAX COMPLIANCE REQUIREMENTS

- 2.1 BIDDERS MUST ENSURE COMPLIANCE WITH THEIR TAX OBLIGATIONS.
- 2.2 BIDDERS ARE REQUIRED TO SUBMIT THEIR UNIQUE PERSONAL IDENTIFICATION NUMBER (PIN) ISSUED BY SARS TO ENABLE THE ORGAN OF STATE TO VERIFY THE TAXPAYER'S PROFILE AND TAX STATUS.
- 2.3 APPLICATION FOR TAX COMPLIANCE STATUS (TCS) PIN MAY BE MADE VIA E-FILING THROUGH THE SARS WEBSITE WWW.SARS.GOV.ZA.
- 2.4 BIDDERS MAY ALSO SUBMIT A PRINTED TCS CERTIFICATE TOGETHER WITH THE BID.
- 2.5 IN BIDS WHERE CONSORTIA / JOINT VENTURES / SUB-CONTRACTORS ARE INVOLVED, EACH PARTY MUST SUBMIT A SEPARATE TCS CERTIFICATE / PIN / CSD NUMBER.
- 2.6 WHERE NO TCS PIN IS AVAILABLE BUT THE BIDDER IS REGISTERED ON THE CENTRAL SUPPLIER DATABASE (CSD), A CSD NUMBER MUST BE PROVIDED.
- 2.7 NO BIDS WILL BE CONSIDERED FROM PERSONS IN THE SERVICE OF THE STATE, COMPANIES WITH DIRECTORS WHO ARE PERSONS IN THE SERVICE OF THE STATE, OR CLOSE CORPORATIONS WITH MEMBERS PERSONS IN THE SERVICE OF THE STATE."

NB: FAILURE TO PROVIDE / OR COMPLY WITH ANY OF THE ABOVE PARTICULARS MAY RENDER THE BID INVALID.

SIGNATURE OF BIDDER:

.....

CAPACITY UNDER WHICH THIS BID IS SIGNED:

(Proof of authority must be submitted e.g. company resolution)

.....

DATE:

.....



**Request for Proposal for the appointment of an
off-site travel agency for the rendering of travel
management services to the National
Department of Social Development for a period
of 36 months**

RFP NO: SD03/2025

Date Issued: 05 December 2025

Briefing Session: 20 January 2026

Closing date and time: 29 January 2026

Bid Validity Period: 120 days

TENDER BOX ADDRESS:

Department of Social Development

Foyer, HSRC Building, 134 Pretorius Street, Pretoria

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INTRODUCTION

As the Department of Social Development, we are uniquely placed to contribute to social transformation, to reduce poverty and promote social integration. Our work is based on partnerships and the Batho Pele principles of service delivery. Our actions are based upon solidarity and engender self-reliance because of the range of our human services.

- **Because of our commitment to social transformation**

We are committed to the agenda of social transformation embodied in the principle of social justice and the Bill of Rights contained in our Constitution. We endeavour to create a better life for the poor, vulnerable, and excluded people in our society.

- **Because our task is to reduce poverty and promote social integration**

Our task is to develop and monitor the implementation of social policy that both creates an enabling environment for and leads to a reduction in poverty. We ensure the provision of social protection and social welfare services to all people who live in our land. We conduct research that develops the social indicators necessary for programme implementation and public accountability.

- **Because our work is based on partnerships and the Batho Pele principles of service delivery**

All our work requires extensive and ongoing consultation with all sectors of our society. Our programmes are integrated with those of other government departments and all spheres of government. We work in partnership with NGOs, faith-based communities, the business sector, organised labour, and other role players. We are committed to the Batho Pele (People First) principles, and use them to improve service delivery to our clients and the public.

- **Because our actions are based upon solidarity and engender self-reliance**

As social service professionals, we act on the basis of solidarity with all of humanity. We seek to empower communities and engender self-reliance by creating conditions for sustainable livelihoods. This involves expanding the range of choices available to communities.

- **Because of the range of our human services**

Our development, social protection and social welfare services span the entire life cycle of human life and encompass advocacy, promotion, prevention, care, mitigation and palliation.

Constitutional Mandate

The Department of Social Development derives its core mandate from the Constitution of the Republic of South Africa, 1996 (Act No. 108 of 1996). Section 27 (1) (c) of the Constitution provides for the right of access to appropriate social assistance to those unable to support themselves and their dependents. In addition, Section 28 (1) of the Constitution sets out the rights of children with regard to appropriate care, basic nutrition, shelter, healthcare and social services, and detention.

Vision

A caring and self-reliant society.

Mission

To transform our society by building conscious and capable citizens through the provision of integrated social development services.

Values

- Human dignity is a fundamental human right that must be protected in terms of the Constitution of South Africa and facilitates freedoms, justice and peace.
- Respect is showing regard for one another and the people we serve and is a fundamental value for the realisation of development goals.
- Integrity is ensuring that we are consistent with our values, principles, actions, and measures and thus generate trustworthiness amongst ourselves and with our stakeholders.
- Accountability refers to our obligation to account for our activities, accept our responsibility for them, and to disclose the results in a transparent manner.
- Equality refers to our obligation to ensure equal access to services, participation of citizens in the decisions that affect their lives and the pursuit of equity imperatives where imbalances exist.

1. PURPOSE OF THIS REQUEST FOR PROPOSAL (RFP)

The purpose of this Request for Proposal (RFP) is to solicit proposals from potential bidder(s) for the provision of travel management services to the Department of Social Development for a period of 36 months.

This RFP document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidder required by the Department of Social Development for the provision of travel management services.

This RFP does not constitute an offer to do business with the Department of Social Development, but merely serves as an invitation to bidder(s) to facilitate a requirements-based decision process.

2. DEFINITIONS

Accommodation means the rental of lodging facilities while away from one's place of abode, but on authorised official duty.

After-hours service refers to an enquiry or travel request that is actioned after normal working hours, i.e. 17h00 to 8h00 on Mondays to Fridays and twenty-four (24) hours on weekends and public holidays

Air travel means travel by airline on authorised official business.

Authorising Official means the employee who has been delegated to authorise travel in respect of travel requests and expenses, e.g. line manager of the traveller.

Car Rental means the rental of a vehicle for a short period of time by a Traveller for official purposes.

Department means the organ of state, Department or Public Entity that requires the provision of travel management services.

Domestic travel means travel within the borders of the Republic of South Africa.

Emergency service means the booking of travel when unforeseen circumstances necessitate an unplanned trip or a diversion from original planned trip.

Commerce refers to the Government's buy-site for transversal contracts.

International travel refers to travel outside the borders of the Republic of South Africa.

Lodge Card is a credit card which is specifically designed purely for business travel expenditure. There is typically one credit card number which is "lodged" with the TMC at to which all expenditure is charged. .

Management Fee is the fixed negotiated fee payable to the Travel Management Company (TMC) in monthly instalments for the delivery of travel management

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services, excluding any indirect service fee not included in the management fee structure (visa, refund, frequent flyer tickets etc).

Merchant Fees are fees charged by the lodge card company at the point of sale for bill back charges for ground arrangements.

On-line booking tool is a web based tool developed by the travel agency or National Treasury on which officials can make bookings direct with third party service providers without the assistance of the consultants of the travel agency.

Quality Management System means a collection of business processes focused on consistently meeting customer requirements and enhancing their satisfaction. It is expressed as the organizational structure, policies, procedures, processes and resources needed to implement quality management.

Regional travel means travel across the border of South Africa to any of the SADC Countries, namely; Angola, Botswana, Democratic Republic of Congo (DRC), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, Swaziland, United Republic of Tanzania, Zambia and Zimbabwe.

Service Level Agreement (SLA) is a contract between the TMC and the Department that defines the level of service expected from the TMC.

Shuttle Service means the service offered to transfer a Traveller from one point to another, for example from place of work to the airport.

Third party fees are fees payable to third party service providers that provides travel related services on an ad hoc basis that is not directly provided by the TMC. These fees include visa fees and courier fees.

Transaction Fee means the fixed negotiated fee charged for each specific service type e.g. international air ticket, charged per type per transaction per traveller.

Traveller refers to a Government official, consultant or contractor travelling on official business on behalf of Government.

Travel Authorisation is the official form utilised by Government reflecting the detail and order number of the trip that is approved by the relevant authorising official.

Travel Booker is the person coordinating travel reservations with the Travel Management Company (TMC) consultant on behalf of the Traveller, e.g. the personal assistant of the traveller.

Travel Management Company or TMC refers to the Company contracted to provide travel management services (Travel Agents).

Travel Voucher means a document issued by the Travel Management Company to confirm the reservation and/or payment of specific travel arrangements.

Value Added Services are services that enhance or complement the general travel management services e.g. Rules and procedures of the airports.

VAT means Value Added Tax.

VIP or Executive Service means the specialised and personalised travel management services to selected employees of Government by a dedicated consultant to ensure a seamless travel experience.

3. LEGISLATIVE FRAMEWORK OF THE BID

3.1. Tax Legislation

Bidder(s) must be compliant when submitting a proposal to the Department of Social Development and remain compliant for the entire contract term with all applicable tax legislation, including but not limited to the Income Tax Act, 1962 (Act No. 58 of 1962) and Value Added Tax Act, 1991 (Act No. 89 of 1991).

- 3.1.1. Bidder(s) must be compliant when submitting a proposal to the Department of Social Development and remain compliant for the entire contract term with all applicable tax legislation, including but not limited to the Income Tax Act, 1962 (Act No. 58 of 1962) and Value Added Tax Act, 1991 (Act No. 89 of 1991).
- 3.1.2. It is a condition of this bid that the tax matters of the successful bidder be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.
- 3.1.3. The Tax Compliance status requirements are also applicable to foreign bidders / individuals who wish to submit bids.
- 3.1.4. It is a requirement that bidders grant a written confirmation when submitting this bid that SARS may on an ongoing basis during the tenure of the contract disclose the bidder's tax compliance status and by submitting this bid such confirmation is deemed to have been granted.

3.1.5. Bidders are required to be registered on the Central Supplier Database and the National Treasury shall verify the bidder's tax compliance status through the Central Supplier Database.

3.1.6. Where Consortia / Joint Ventures / Sub-contractors are involved, each party must be registered on the Central Supplier Database and their tax compliance status will be verified through the Central Supplier Database.

3.2. **Procurement Legislation**

The Department of Social Development has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act, No. 1 of 1999), the Preferential Procurement Policy Framework Act 2000 (Act, No.5 of 2000) and the Broad-Based Black Economic Empowerment Act, 2003 (Act, No. 53 of 2003).

3.3. **Technical Legislation and/or Standards**

Bidder(s) should be cognisant of the legislation and/or standards specifically applicable to the services.

4. **BRIEFING SESSION**

A non- compulsory briefing and clarification session will be held to clarify to bidder(s) the scope and extent of work to be executed.

Date: 20 January 2026

Time: 11:00 am

Venue: 318N Boardroom, Social development, HSRC Building, 134 Pretorius Street, Pretoria

Failure to attend the compulsory tender briefing session will result in a bid being disqualified.

5. **TIMELINE OF THE BID PROCESS**

The period of validity of tender and the withdrawal of offers, after the closing date and time is 120 days. The project timeframes of this bid are set out below:

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Activity	Due Date
Advertisement of bid on Government e-tender portal / print media / Tender Bulletin	05 December 2025
Briefing and clarification session	20 January 2026
Questions relating to bid from bidder(s)	26 January 2029
Bid closing date	29 January 2026
Notice to bidder(s)	The Department of Social Development will endeavour to inform bidders of the progress until conclusion of the tender.

All dates and times in this bid are South African standard time.

Any time or date in this bid is subject to change at the Department of Social Development's discretion. The establishment of a time or date in this bid does not create an obligation on the part of the Department of Social Development to take any action, or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if the Department of Social Development extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

6. CONTACT AND COMMUNICATION

6.1. A nominated official of the bidder(s) can make enquiries in writing, to:

Mr Z. Mantantana

Tel No: (012) 312 7463

Email: ZolisaM@dsd.gov.za

6.2. The delegated official of the Department of Social Development may communicate with Bidder(s) where clarity is sought in the bid proposal.

6.3. Any communication to an official or a person acting in an advisory capacity for the Department of Social Development in respect of the bid between the closing date and the award of the bid by the Bidder(s) is discouraged.

6.4. All communication between the Bidder(s) and the Department of Social Development must be done in writing.

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- 6.5. Whilst all due care has been taken in connection with the preparation of this bid, the Department of Social Development makes no representations or warranties that the content of the bid or any information communicated to or provided to Bidder(s) during the bidding process is, or will be, accurate, current or complete. The Department of Social Development, and its employees and advisors will not be liable with respect to any information communicated which may not accurate, current or complete.
- 6.6. If Bidder(s) finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by the Department of Social Development (other than minor clerical matters), the Bidder(s) must promptly notify the Department of Social Development in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the Department of Social Development an opportunity to consider what corrective action is necessary (if any).
- 6.7. Any actual discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by the Department of Social Development will, if possible, be corrected and provided to all Bidder(s) without attribution to the Bidder(s) who provided the written notice.
- 6.8. All persons (including Bidder(s)) obtaining or receiving the bid and any other information in connection with the Bid or the Tendering process must keep the contents of the Bid and other such information confidential, and not disclose or use the information except as required for the purpose of developing a proposal in response to this Bid.

7. LATE BIDS

Bids received after the closing date and time, at the address indicated in the bid documents, will not be accepted for consideration and where practicable, be returned unopened to the Bidder(s).

8. COUNTER CONDITIONS

Bidders' attention is drawn to the fact that amendments to any of the Bid Conditions or setting of counter conditions by Bidders or qualifying any Bid Conditions will result in the invalidation of such bids.

9. FRONTING

- 9.1. Government supports the spirit of broad based black economic empowerment and recognizes that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background the Government condemn any form of fronting.
- 9.2. The Government, in ensuring that Bidders conduct themselves in an honest manner will, as part of the bid evaluation processes, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established during such enquiry / investigation, the onus will be on the Bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the bid / contract and may also result in the restriction of the Bidder /contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies the Department of Social Development may have against the Bidder / contractor concerned.

10. SUPPLIER DUE DILIGENCE

The Department of Social Development reserves the right to conduct supplier due diligence prior to final award or at any time during the contract period. This may include site visits and requests for additional information.

11. SUBMISSION OF PROPOSALS

- 11.1. Bid documents may either be posted to the Department of Social Development, Private Bag X901, Pretoria, 0001 OR deposited in the tender box at the Foyer of the HSRC Building, 134 Pretorius Street, Pretoria on or before the closing date and time.
- 11.2. Bid documents will only be considered if received by the Department of Social Development before the closing date and time, regardless of the method used to send or deliver such documents to the Department of Social Development

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11.3. The bidder(s) are required to submit two (2) copies of each file (one (1) original and one (1) duplicate) and one (1) USB with content of each file by the [Closing date. Each file and USB must be marked correctly and sealed separately for ease of reference during the evaluation process. Furthermore, the file and information in the USB must be labelled and submitted in the following format:

FILE 1 (TECHNICAL FILE)	FILE 2 (PRICE & BBBEE)
Exhibit 1: Pre-qualification documents <i>(Refer to Section 17.1 - Gate 0: Pre-qualification Criteria (Table 1))</i>	Exhibit 1: Pricing Schedule <i>(Refer to Section 16 – Pricing Model and Annexure A3 – Pricing Submission)</i>
Exhibit 2: <ul style="list-style-type: none"> • Technical Responses and Bidder Compliance Checklist for Technical Evaluation • Supporting documents for technical responses. <i>(Refer to Section 17.2 - Gate 1: Technical Evaluation Criteria and Annexure A2 – Desktop Evaluation Technical Scorecard and Compliance Checklist)</i> 	
Exhibit 3: <ul style="list-style-type: none"> • General Conditions of Contract (GCC) • Draft Service Level Agreement <i>(Refer to Section 20 – Service Level Agreement)</i> 	
Exhibit 4: <ul style="list-style-type: none"> • Company Profile • Any other supplementary information 	

11.4. Bidders are requested to initial each page of the tender document on the top right hand corner.



12. PRESENTATION / DEMONSTRATION

The Department of Social Development reserves the right to request presentations/demonstrations from the short-listed Bidders as part of the bid evaluation process.

13. DURATION OF THE CONTRACT

The successful bidder will be appointed for a period of 36 Months months with an option to renew the contract for an additional 12 (twelve) months on the same terms and conditions unless the parties agree otherwise. The renewal of the contract will be at intervals of 12 (twelve) months each.

14. SCOPE OF WORK

14.1. Background

The Department of Social Development currently uses Atlantis Corporate to manage the travel requisition and travel expense processes within the travel management lifecycle. The travel requisition process is currently a manual process. The travel requisition is manually captured on forms that go through a manual authorisation approval procedure and are then forwarded to the the Department of Social Development travel co-ordinator. The Department of Social Development travel co-ordinator then issues a manual order to the travel management company to confirm a booking.

The approved travel requests will then be sent via e-mail system.

The Department of Social Development's primary objective in issuing this RFP is to enter into agreement with a successful bidder(s) who will achieve the following:

- a) Provide the Department of Social Development with the travel management services that are consistent and reliable and will maintain a high level of traveller satisfaction in line with the service levels;
- b) Achieve significant cost savings for the Department of Social Development without any degradation in the services;
- c) Appropriately contain the Department of Social Development's risk and traveller risk.

- d) ***Provide the Department with an on-line booking tool that will allow officials to make bookings direct with third party service providers without the assistance of the consultants of the travel agency. This booking tool must be fully operational within Six (6) months after the award of the contract.***

National Treasury is in the process of developing an on-line booking tool for Government that will replaces the on-line tool of the travel agency once it is fully operational.

14.2. Travel Volumes

The Department of Social Development's current travel total volumes per annum includes air travel, accommodation, car hire, forex, conference, etc. The table below details the number of transactions for the period from 01 January 2023 to 31 December 2024.

Category	Spend	#
Air Travel Domestic	32 416 275.60	1740
Accommodation Domestic	18 923 468.18	1045
Shuttles	8 212 738.5	1520
Car Hire	6 354 602.57	994
Air Travel International	4 942 400.39	69
Conferences	6 907 658.07	594
Tour Packages	2 295.00	28
No Shows	179 347.91	12
After Hours Fees	629 329.24	62
Grand Total	78 568 115.46	

Note: These figures are projections based on the current trends and they may change during the tenure of the contract. The figures are meant for illustration purposes to assist the bidders to prepare their proposal.

14.3. -Service Requirements

14.3.1. General

The successful bidder will be required to provide travel management services. Deliverables under this section include without limitation, the following:

- a. The travel services will be provided to all Travellers travelling on behalf of the Department of Social Development, locally and internationally This will include

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employees and contractors, consultants and clients where the agreement is that the Department of Social Development is responsible for the arrangement and cost of travel.

- b. Provide travel management services during normal office hours (Monday to Friday 8h00 – 16:30 h00) and provide after hours and emergency services as stipulated in paragraph 15.3.6.
- c. Familiarisation with current Department of Social Development travel business processes.
- d. Familiarisation with current travel suppliers and negotiated agreements that are in place between the Department of Social Development and third parties.
- e. Assist with further negotiations for better deals with travel service providers.
- f. Familiarisation with current Department of Social Development Travel Policy and implementations of controls to ensure compliance.
- g. Penalties incurred as a result of the inefficiency or fault of a travel consultant will be for the TMC's account, subject to the outcome of a formal dispute process.
- h. Provide a facility for the Department of Social Development to update their travellers' profiles.
- i. Manage the third party service providers by addressing service failures and complaints against these service providers.
- j. Consolidate all invoices from travel suppliers.
- k. Provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition.
- l. Provide the reference letters from at least Five (5) contactable existing/recent clients (within past 3 years) which are of a similar size to the Department of Social Development.**
- m. The bidder must be a member of ASATA & IATA (Association of South African Travel Agents). Proof of such membership must be submitted with the bid at closing date together with the bid document.**

14.3.2. Reservations

The Travel Management Company will:

- a. Receive travel requests from travellers and/or travel bookers, respond with quotations (confirmations) and availability. Upon the receipt of the relevant approval, the travel agent will issue the required e-tickets and vouchers immediately and send it to the travel Booker and traveller via the agreed communication medium (SMS and Emails).
- b. Always endeavour to make the most cost effective travel arrangements based on the request from the traveller and/or travel Booker.
- c. Apprise themselves of all travel requirements for destinations to which travellers will be travelling and advise the Traveller of alternative plans that are more cost effective and more convenient where necessary.
- d. Obtain a minimum of three (3) price comparisons for all travel requests where the routing or destination permits.
- e. Book the negotiated discounted fares and rates where possible.
- f. must keep abreast of carrier schedule changes as well as all other alterations and new conditions affecting travel and make appropriate adjustments for any changes in flight schedules prior to or during the traveller's official trip. When necessary, e-tickets and billing shall be modified and reissued to reflect these changes.
- g. Book parking facilities at the airports where required for the duration of the travel.
- h. Respond timely and process all queries, requests, changes and cancellations timeously and accurately.
- i. Must be able to facilitate group bookings (e.g. for meetings, conferences, events, etc.)
- j. Must issue all necessary travel documents, itineraries and vouchers timeously to traveller(s) prior to departure dates and times.
- k. Advise the Traveller of all visa and inoculation requirements well in advance.
- l. Assist with the arrangement of foreign currency and the issuing of travel insurance for international trips where required.
- m. Facilitate any reservations that are not bookable on the Global Distribution System (GDS).

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- n. Facilitate the bookings that are generated through their own or third party Online Booking Tool (OBT) where it can be implemented.
- o. Note that, unless otherwise stated, all cases include domestic, regional and international travel bookings.
- p. Visa applications will not be the responsibility of the TMC; however the relevant information must be supplied to the traveller(s) where visas will be required.
- q. Negotiated airline fares, accommodation establishment rates, car rental rates, etc. that are negotiated directly or established by National Treasury or by the Department of Social Development are **non-commissionable**, where commissions are earned for the Department of Social Development bookings all these commissions should be returned to the Department of Social Development on a quarterly basis.
- r. Ensure confidentiality in respect of all travel arrangements and concerning all persons requested by the Department of Social Development.
- s. Timeous submission of proof that services have been satisfactorily delivered (invoices) as per the Department of Social Development instructions

14.3.3. Air Travel

- a. The TMC must be able to book full service carriers as well as low cost carriers.
- b. The TMC will book the most cost effective airfares possible for domestic travel.
- c. For international flights, the airline which provides the most cost effective and practical routings may be used.
- d. The TMC should obtain three or more price comparisons where applicable to present the most cost effective and practical routing to the Traveller.
- e. The airline ticket should include the applicable airline agreement number as well as the individual loyalty program number of the Traveller (if applicable).
- f. Airline tickets must be delivered electronically (SMS and/or email format) to the traveller(s) and travel bookers promptly after booking before the departure times.
- g. The TMC will also assist with the booking of charters for VIPs utilising the existing transversal term contract where applicable as well as the sourcing of alternative service providers for other charter requirements.

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- h. The TMC will be responsible for the tracking and management of unused e-tickets as per agreement with the institution and provide a report on refund management once a quarter.
- i. The TMC must during their report period provide proof that bookings were made against the discounted rates on the published fairs where applicable.
- j. Ensure that travellers are always informed of any travel news regarding airlines (like baggage policies, checking in arrangements, etc.)
- k. Assist with lounge access if and when required.

14.3.4. Accommodation

- a. The TMC will obtain price comparisons within the maximum allowable rate matrix as per the cost containment instruction of the National Treasury.
- b. The TMC will obtain three price comparisons from accommodation establishments that provide the best available rate within the maximum allowable rate and that is located as close as possible to the venue or office or location or destination of the traveller
- c. This includes planning, booking, confirming and amending of accommodation with any establishment (hotel group, private hotel, guest house or Bed & Breakfast) in accordance with the Department of Social Development travel policy.
- d. The Department of Social Development travellers may only stay at accommodation establishments with which the Department of Social Development has negotiated corporate rates. Should there be no rate agreement in place in the destination, or should the contracted establishment be unable to accommodate the traveller, the TMC will source suitable accommodation bearing in mind the requirement of convenience for the traveller and conformation with acceptable costs, or as stipulated in written directives issued from time to time by the National treasury or the Department of Social Development.
- e. Accommodation vouchers must be issued to all the Department of Social Development travellers for accommodation bookings and must be invoiced to the Department of Social Development as per arrangement. Such invoices must be supported by a copy of the original hotel accommodation charges.

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- f. The TMC must during their report period provide proof, where applicable, that accommodation rates were booked within the maximum allowable rates as per the cost containment instruction of the National Treasury.
- g. Cancellation of accommodation bookings must be done promptly to guard against no show and late cancellation fees.

14.3.5. Car Rental and Shuttle Services

- a. The TMC will book the approved category vehicle in accordance with the Department of Social Development Travel Policy with the appointed car rental service provider from the closest rental location (airport, hotel and venue).
- b. The travel consultant should advise the Traveller on the best time and location for collection and return considering the Traveller's specific requirements.
- c. The TMC must ensure that relevant information is shared with travellers regarding rental vehicles, like e-tolls, refuelling, keys, rental agreements, damages and accidents, etc.
- d. For international travel the TMC may offer alternative ground transportation to the Traveller that may include rail, buses and transfers.
- e. The TMC will book transfers in line with the Department of Social Development Travel Policy with the appointed and/or alternative service providers. Transfers can also include bus and coach services.
- f. The TMC should manage shuttle companies on behalf of the Department of Social Development and ensure compliance with minimum standards. The TMC should also assist in negotiating better rates with relevant shuttle companies as well as fixed rates on certain routes (e.g. HSRC Building – O R Tambo International Airport).
- g. The TMC must during their report period provide proof that negotiated rates were booked, where applicable.

14.3.6. After Hours and Emergency Services

- a. The TMC must provide a consultant or team of consultants to assist Travellers with after hours and emergency reservations and changes to travel plans.
- b. A dedicated consultant/s must be available to assist VIP/Executive Travellers with after hour or emergency assistance.

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- c. After hours' services must be provided from Monday to Friday outside the official hours (16:30h00 to 8h00) and twenty-four (24) hours on weekends and Public Holidays.
- d. A call centre facility or after hours contact number should be available to all travellers so that when required, unexpected changes to travel plans can be made and emergency bookings attended to.
- e. The Travel Management Company must have a standard operating procedure for managing after hours and emergency services. This must include purchase order generation of the request within 24 hours.

14.4. Communication

- 14.4.1. The TMC may be requested to conduct workshops and training sessions for Travel Bookers of the Department of Social Development.
- 14.4.2. All enquiries must be investigated and prompt feedback be provided in accordance with the Service Level Agreement.
- 14.4.3. The TMC must ensure sound communication with all stakeholders. Link the business traveller, travel coordinator, travel management company in one smooth continuous workflow.

14.5. Financial Management

- 14.5.1. The TMC must implement the rates negotiated by the Department of Social Development with travel service providers or the discounted air fares, or the maximum allowable rates established by the National Treasury where applicable.
- 14.5.2. The TMC will be responsible to manage the service provider accounts. This will include the timely receipt of invoices to be presented to the Department of Social Development for payment within the agreed time period.
- 14.5.3. Enable savings on total annual travel expenditure and this must be reported and proof provided during monthly and quarterly reviews.
- 14.5.4. The TMC will be required to offer a 30 day bill-back account facility to institutions should a lodge card not be offered. 'Bill back', refers to the supplier sending the bill back to the TMC, who, in turn, invoices the Department of Social Development for the services rendered.

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- 14.5.5. Where pre-payments are required for smaller Bed & Breakfast /Guest House facilities, these will be processed by the TMC. These are occasionally required at short notice and even for same day bookings.
- 14.5.6. Consolidate Travel Supplier bill-back invoices.
- 14.5.7. In certain instances where institutions have a travel lodge card in place, the payment of air, accommodation and ground transportation is consolidated through a corporate card vendor.
- 14.5.8. The TMC is responsible for the consolidation of invoices and supporting documentation to be provided to the Department of Social Development's Financial Department on the agreed time period (e.g. weekly). This includes attaching the Travel Authorisation or Purchase Order and other supporting documentation to the invoices reflected on the Service provider bill-back report or the credit card statement.
- 14.5.9. Ensure Travel Supplier accounts are settled timeously.
- 14.6. Technology, Management Information and Reporting**
- 14.6.1. The TMC must have the capability to consolidate all management information related to travel expenses into a single source document with automated reporting tools.
- 14.6.2. The implementation of an Online Booking Tool to facilitate domestic bookings should be considered to optimise the services and related fees.
- 14.6.3. All management information and data input must be accurate.
- 14.6.4. The TMC will be required to provide the Department of Social Development with a minimum of three (3) standard monthly reports that are in line with the National Treasury's Cost Containment Instructions reporting template requirements at no cost.
- The reporting templates can be found on
<http://www.treasury.gov.za/legislation/pfma/TreasuryInstruction/AccountantGeneral.aspx>
- 14.6.5. Reports must be accurate and be provided as per the Department of Social Development's specific requirements at the agreed time. Information must be available on a transactional level that reflect detail including the name of the traveller, date of travel, spend category (example air travel, shuttle, accommodation).

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14.6.6. The Department of Social Development may request the TMC to provide additional management reports.

14.6.7. Reports must be available in an electronic format for example Microsoft Excel.

14.6.8. Service Level Agreements reports must be provided on the agreed date. It will include but will not be limited to the following:

i. Travel

- a) After hours' Report;
- b) Compliments and complaints;
- c) Consultant Productivity Report;
- d) Long term accommodation and car rental;
- e) Extension of business travel to include leisure;
- f) Upgrade of class of travel (air, accommodation and ground transportation);
- g) Bookings outside Travel Policy.

ii. Finance

- a) Reconciliation of commissions/rebates or any volume driven incentives;
- b) Creditor's ageing report;
- c) Creditor's summary payments;
- d) Daily invoices;
- e) Reconciled reports for Travel Lodge card statement;
- f) No show report;
- g) Cancellation report;
- h) Receipt delivery report;
- i) Monthly Bank Settlement Plan (BSP) Report;
- j) Refund Log;
- k) Open voucher report, and
- l) Open Age Invoice Analysis.

14.6.9. The TMC will implement all the necessary processes and programs to ensure that all the data is secure at all times and not accessible by any unauthorised parties.

14.7. Account Management

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- 14.7.1. An Account Management structure should be put in place to respond to the needs and requirements of the Government Department and act as a liaison for handling all matters with regard to delivery of services in terms of the contract.
- 14.7.2. The TMC must appoint a dedicated Account or Business Manager that is ultimately responsible for the management of the Department of Social Development's account.
- 14.7.3. The necessary processes should be implemented to ensure good quality management and ensuring Traveller satisfaction at all times.
- 14.7.4. A complaint handling procedure must be implemented to manage and record the compliments and complaints of the TMC and other travel service providers.
- 14.7.5. Ensure that the Department of Social Development's Travel Policy is enforced.
- 14.7.6. The Service Level Agreement (SLA) must be managed and customer satisfaction surveys conducted to measure the performance of the TMC.
- 14.7.7. Ensure that workshops/training is provided to Travellers and/or Travel Bookers
- 14.7.8. During reviews, comprehensive reports on the travel spend and the performance in terms of the SLA must be presented.

14.8. Value Added Services

The TMC must provide the following value added services:

- 14.8.1. Destination information for regional and international destinations:
 - i. Health warnings;
 - ii. Weather forecasts;
 - iii. Places of interest;
 - iv. Visa information;
 - v. Travel alerts;
 - vi. Location of hotels and restaurants;
 - vii. Information including the cost of public transport;
 - viii. Rules and procedures of the airports;
 - ix. Business etiquette specific to the country;
 - x. Airline baggage policy; and

xi. **Supplier updates**

- 14.8.2. Electronic voucher retrieval via web and smart phones;
- 14.8.3. SMS notifications for travel confirmations;
- 14.8.4. Travel audits;
- 14.8.5. Global Travel Risk Management;
- 14.8.6. VIP services for Executives that include, but is not limited to check-in support.

14.9. Cost Management

- 14.9.1. The National Treasury cost containment initiative and the Department of Social Development's Travel Policy is establishing a basis for a cost savings culture.
- 14.9.2. It is the obligation of the TMC Consultant to advise on the most cost effective option at all times, and costs should be within the framework of the National Treasury's cost containment instructions.
- 14.9.3. The TMC plays a pivotal role to provide high quality travel related services that are designed to strike a balance between effective cost management, flexibility and traveller satisfaction.
- 14.9.4. The TMC should have in-depth knowledge of the relevant supplier(s)' products, to be able to provide the best option and alternatives that are in accordance with the Department of Social Development's Travel Policy to ensure that the Traveller reaches his/her destination safely, in reasonable comfort, with minimum disruption, cost effectively and in time to carry out his/her business.

14.10. Quarterly and Annual Travel Reviews

- 14.10.1. Quarterly reviews are required to be presented by the Travel Management Company on all the Department of Social Development's travel activity in the previous three-month period. These reviews are comprehensive and presented to the Department of Social Development's Procurement and Finance teams as part of the performance management reviews based on the service levels.
- 14.10.2. Annual Reviews are also required to be presented to the Department of Social Development's Senior Executives.

14.10.3. These Travel Reviews will include without limitation the following information

- i. Institution to list the information that will be required. The reporting requirements in the National Treasury Instruction 3 of 2016/17 (Cost Containment Measures related to Travel & Subsistence) may be used as minimum.

14.11. Office Management

14.11.1. The TMC to ensure high quality service to be delivered at all times to the Department of Social Development's travellers. The TMC is required to provide the Department of Social Development with highly skilled and qualified human resources of the following roles but not limited to:

- a. Senior Consultants
- b. Intermediate Consultants
- c. Junior Consultants
- d. Travel Manager (Operational)
- e. Finance Manager / Branch Accountant
- f. Admin Back Office (Creditors / Debtors/Finance Processors)
- g. Strategic Account Manager (per hour)
- h. System Administrator (General Admin)

14.12. Off-site Facilities

14.12.1. The TMC must provide their own office space, furniture, office equipment and I T infrastructure and related goods and services for the execution of the contract.

15. PRICING MODEL

The Department of Social Development requires bidders to bid on the transaction fee model for off-site travel agencies.

15.1. Transaction Fees

Refer Annexure A3: Pricing Schedule

15.1.1. The transaction fee must be a fixed amount per service. The fee must be linked to the cost involved in delivering the service and not a percentage of the value or cost of the service provided by third party service providers.

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15.1.2. The Bidder must further indicate the estimated percentage split between Traditional booking and On-line bookings.

15.2. Volume driven incentives

15.2.1. It is important for bidders to note the following when determining the pricing:

- i. National Treasury has negotiated non-commissionable fares and rates with various airlines carriers and other service providers;
- ii. No override commissions earned through the Department of Social Development reservations will be paid to the TMCs;
- iii. An open book policy will apply and any commissions earned through the Department of Social Development volumes will be reimbursed to the Department of Social Development.
- iv. TMCs are to book these negotiated rates or the best fare available, whichever is the most cost effective for the institution.

16. EVALUATION AND SELECTION CRITERIA

The Department of Social Development has set minimum standards (Gates) that a bidder needs to meet in order to be evaluated and selected as a successful bidder.

The minimum standards consist of the following:

Pre-qualification Criteria (Gate 0)	Technical Evaluation Criteria (Gate 1)	Price and B-BBEE Evaluation (Gate 2)
Bidders must submit all documents as outlined in paragraph 17.1 (Table 1) below. Only bidders that comply with ALL these criteria will proceed to Gate 1.	Bidder(s) are required to achieve a minimum of 80 points out of 100 points to proceed to Gate 2 (Price and BEE).	Bidder(s) will be evaluated out of 100 points and Gate 2 will only apply to bidder(s) who have met and exceeded the threshold of 80 points.

16.1. Gate 0: Pre-qualification Criteria

Without limiting the generality of The Department of Social Development's other critical requirements for this Bid, bidder(s) must submit the documents listed in **Table 1** below. All documents must be completed and signed by the duly authorised representative of the prospective bidder(s). During this phase Bidders' responses will be evaluated

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based on compliance with the listed administration and mandatory bid requirements.
The bidder(s) proposal may be disqualified for non-submission of any of the documents.

Table 1: Documents that must be submitted for Pre-qualification

Document that must be submitted	Non-submission may result in disqualification?	
Invitation to Bid – SBD 1	YES	Complete and sign the supplied pro forma document
Tax Status Tax Clearance Certificate/ Tax Pin	YES	<ul style="list-style-type: none"> i. Written confirmation that SARS may on an ongoing basis during the tenure of the contract disclose the bidder's tax compliance status. (Refer Section 4.1.4) ii. Proof of Registration on the Central Supplier Database (Refer Section 4.1.5) iii. Vendor number iv. In the event where the Bidder submits a hard copy of the Tax Clearance Certificate, the CSD verification outcome will take precedence.
Bidders disclosure – SBD 4	YES	Complete and sign the supplied pro forma document
Preference Point Claim Form – SBD 6.1	NO	Non-submission will lead to a zero (0) score on specific goals
Bidder Compliance form for Functional Evaluation	YES	Complete and sign
Registration on Central Supplier Database (CSD)	NO	The Travel Management Company (TMC) must be registered as a service provider on the Central Supplier Database (CSD). If you are not registered proceed to complete the registration of your company prior to submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Submit proof of registration.
IATA Licence / Certificate	YES	<ul style="list-style-type: none"> i. Bidders are required to submit their International Air Transport Association (IATA) licence/ certificate (certified copy) at closing date together with the document. ii. Where a bidding company is using a 3rd party IATA licence, proof of the

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		agreement must be attached and copy of the certificate to that effect at closing date.
ASATA License/ Certificate		Bidders are required to submit their ASATA certificate together with the document
Pricing Schedule	YES	Submit full details of the pricing proposal as per Annexure A3 in a separate envelope

16.2. Gate 1: Technical Evaluation Criteria = 100 points

All bidders are required to respond to the technical evaluation criteria scorecard and compliance checklist. Refer to **Annexure A2** for detailed information

Only Bidders that have met the Pre-Qualification Criteria in (Gate 0) will be evaluated in Gate 1 for functionality. Functionality will be evaluated as follows:

- i. Desktop Technical Evaluation – Bidders will be evaluated out of 80 points and are required to achieve minimum threshold of 70 points of 80 points.
- ii. Presentation and system demonstration – Bidders will be evaluated out of 20 points and are required to achieve minimum threshold of 10 points out of 20 points. **Stage 2 – Site visit, presentation, and demonstration of the systems**

Onsite demonstration of both traditional and online booking Systems	Functional / operational systems from Order creation, invoice, statement printing, back office and MIS, Age analysis/reports as requested by the client at time of demonstration/presentation I. <i>Partial / non - functional operational system –</i> II. <i>Fully functional operational system-</i>	
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- iii. The overall combined score must be equal or above 80 (**threshold**) points in order to proceed to Gate 2 for Price and BBBEE evaluations.

As part of due diligence, The Department of Social Development will conduct a site visit at a client of the Bidder (reference) for validation of the services rendered. The choice of site will be at The Department of Social Development's sole discretion.

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The Bidder's information will be scored according to the following points system:

Functionality	Maximum Points Achievable	Minimum Threshold
Desktop Technical Evaluation Details found in Annexure A2 – Technical Scorecard	80	70
Presentation and Off-site Reference Checks	20	10
OVERALL COMBINED POINTS	100	80

16.3. Gate 2: Price and Specific Goals Evaluation (90+10) = 100 points

Only Bidders that have met the 80 point threshold in Gate 1 will be evaluated in Gate 2 for price and specific goals. Price and specific goals will be evaluated as follows:

In terms of regulation 6 of the Preferential Procurement Regulations 2022 pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be adjudicated on the 80/20-preference point system in terms of which points are awarded to bidders on the basis of:

- The bid price (maximum 90 points)
- Specific goals (maximum 10 points)

i. Stage 1 – Price Evaluation (90 Points)

Criteria	Points
Price Evaluation	
$P_s = 890 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	90

The following formula will be used to calculate the points for price:

Where

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Ps	=	Points scored for comparative price of bid under consideration
Pt	=	Comparative price of bid under consideration
Pmin	=	Comparative price of lowest acceptable bid

ii. Stage 2 – Specific goals (10 Points)

a. Specific Goals Points allocation

A maximum of 10 points may be allocated to a bidder for attaining their specific goals in accordance with the table below:

The specific goals allocated points in terms of this tender	Number of points allocated (90/10 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Organisations which are 51% owned black people who are women	4	
Organisations which are 51% owned black people which are youth	3	
Entities Owned by People with disabilities	3	

Points for specific goals may be allocated to bidders on submission of the following documentation or evidence:

- A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1);
- CSD report and CIPC Company documents verifying ownership of the Company
- Doctor's letter confirming the disability of the Company Director.

b. Joint Ventures, Consortiums and Trusts

A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. The Department of Social Development will accept signed agreements as acceptable proof of the existence of a joint venture and/or consortium arrangement.

The joint venture and/or consortium agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or consortium party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or consortium arrangement.

c. Sub-contracting

Bidders/ tenderers who want to claim Preference points will have to comply fully with regulations 11(8) and 11(9) of the PPPFA Act with regard to sub-contracting.

The following is an extract from the PPPFA Act:

11(8) "A person must not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub- contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract."

11(9) "A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract."

iii. Stage 3 (80 + 20 = 100 points)

The Price and BBBEE points will be consolidated.

17. GENERAL CONDITIONS OF CONTRACT

Any award made to a bidder(s) under this bid is conditional, amongst others, upon –

- a. The bidder(s) accepting the terms and conditions contained in the General Conditions of Contract as the minimum terms and conditions upon which The Department of Social Development is prepared to enter into a contract with the successful Bidder(s).
- b. The bidder submitting the General Conditions of Contract to The Department of Social Development together with its bid, duly signed by an authorised representative of the bidder.

18. CONTRACT PRICE ADJUSTMENT

Contract price adjustments will be done annually on the anniversary of the contract start date. The price adjustment will be based on the Consumer Price Index Headline Inflation

STATS SA P0141 (CPI), Table E	Table E - All Items
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19. SERVICE LEVEL AGREEMENT

- 19.1. Upon award The Department of Social Development and the successful bidder will conclude a Service Level Agreement regulating the specific terms and conditions applicable to the services being procured by the Department of Social Development, more or less in the format of the draft Service Level Indicators included in this tender pack.
- 19.2. The Department of Social Development reserves the right to vary the proposed draft Service Level Indicators during the course of negotiations with a bidder by amending or adding thereto.
- 19.3. Bidder(s) are requested to:
 - a. Comment on draft Service Level Indicators and where necessary, make proposals to the indicators;
 - b. Explain each comment and/or amendment; and
 - c. Use an easily identifiable colour font or “track changes” for all changes and/or amendments to the Service Level Indicators for ease of reference.

- 19.4. The Department of Social Development reserves the right to accept or reject any or all amendments or additions proposed by a bidder if such amendments or additions are unacceptable to The Department of Social Development or pose a risk to the organisation.

20. SPECIAL CONDITIONS OF THIS BID

The Department of Social Development reserves the right:

- 20.1. To award this tender to a bidder that did not score the highest total number of points, only in accordance with section 2(1)(f) of the PPPFA (Act 5 of 2000)
- 20.2. To negotiate with one or more preferred bidder(s) identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other bidder(s) who has not been awarded the status of the preferred bidder(s).
- 20.3. To accept part of a tender rather than the whole tender.
- 20.4. To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the Bid.
- 20.5. To correct any mistakes at any stage of the tender that may have been in the Bid documents or occurred at any stage of the tender process.
- 20.6. To cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after presentations have been made, and/or after tenders have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.
- 20.7. Award to multiple bidders based either on size or geographic considerations.

**21. THE DEPARTMENT OF SOCIAL DEVELOPMENT REQUIRES BIDDER(S) TO
DECLARE**

In the Bidder's Technical response, bidder(s) are required to declare the following:

21.1. Confirm that the bidder(s) is to: –

- a. Act honestly, fairly, and with due skill, care and diligence, in the interests of the Department of Social Development;
- b. Have and employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- c. Act with circumspection and treat the Department of Social Development fairly in a situation of conflicting interests;
- d. Comply with all applicable statutory or common law requirements applicable to the conduct of business;
- e. Make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with the Department of Social Development;
- f. Avoidance of fraudulent and misleading advertising, canvassing and marketing;
- g. To conduct their business activities with transparency and consistently uphold the interests and needs of the Department of Social Development as a client before any other consideration; and
- h. To ensure that any information acquired by the bidder(s) from the Department of Social Development will not be used or disclosed unless the written consent of the client has been obtained to do so.

22. CONFLICT OF INTEREST, CORRUPTION AND FRAUD

- 22.1. The Department of Social Development reserves its right to disqualify any bidder who either itself or any of whose members (save for such members who hold a minority interest in the bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of [Institution name] or any other government

REQUEST FOR PROPOSAL NO.
Appointment of Travel Management Company
To Provide Travel Management Services to the National Department of Social Development
organ or entity and whether from the Republic of South Africa or otherwise
("Government Entity")

- a. engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this bid;
- b. seeks any assistance, other than assistance officially provided by a Government Entity, from any employee, advisor or other representative of a Government Entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- c. makes or offers any gift, gratuity, anything of value or other inducement, whether lawful or unlawful, to any of The Department of Social Development's officers, directors, employees, advisors or other representatives;
- d. makes or offers any gift, gratuity, anything of any value or other inducement, to any Government Entity's officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- e. accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a Government Entity;
- f. pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, that is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a Government Entity;
- g. has in the past engaged in any matter referred to above; or
- h. has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such bidder, member or director's name not specifically appearing on the List of Tender Defaulters kept at National Treasury.

23. MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT

- 23.1. The bidder should note that the terms of its Tender will be incorporated in the proposed contract by reference and that the Department of Social Development relies upon the bidder's Tender as a material representation in making an award to a successful bidder and in concluding an agreement with the bidder.
- 23.2. It follows therefore that misrepresentations in a Tender may give rise to service termination and a claim by the Department of Social Development against the bidder notwithstanding the conclusion of the Service Level Agreement between the Department of Social Development and the bidder for the provision of the Service in question. In the event of a conflict between the bidder's proposal and the Service Level Agreement concluded between the parties, the Service Level Agreement will prevail.

24. PREPARATION COSTS

The Bidder will bear all its costs in preparing, submitting and presenting any response or Tender to this bid and all other costs incurred by it throughout the bid process. Furthermore, no statement in this bid will be construed as placing the Department of Social Development, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidder(s) in the preparation of their response to this bid.

25. INDEMNITY

If a bidder breaches the conditions of this bid and, as a result of that breach, the Department of Social Development incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process and/or enforcement of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds the Department of Social Development harmless from any and all such costs which the Department of Social Development may incur and for any damages or losses the Department of Social Development may suffer.

26. PRECEDENCE

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this document by reference.

27. LIMITATION OF LIABILITY

A bidder participates in this bid process entirely at its own risk and cost. The Department of Social Development shall not be liable to compensate a bidder on any grounds whatsoever for any costs incurred or any damages suffered as a result of the Bidder's participation in this Bid process.

28. TAX COMPLIANCE

No tender shall be awarded to a bidder who is not tax compliant. The Department of Social Development reserves the right to withdraw an award made, or cancel a contract concluded with a successful bidder in the event that it is established that such bidder was in fact not tax compliant at the time of the award, or has submitted a fraudulent Tax Clearance Certificate to The Department of Social Development, or whose verification against the Central Supplier Database (CSD) proves non-compliant. The Department of Social Development further reserves the right to cancel a contract with a successful bidder in the event that such bidder does not remain tax compliant for the full term of the contract.

29. TENDER DEFAULTERS AND RESTRICTED SUPPLIERS

No tender shall be awarded to a bidder whose name (or any of its members, directors, partners or trustees) appear on the Register of Tender Defaulters kept by National Treasury, or who have been placed on National Treasury's List of Restricted Suppliers. The Department of Social Development reserves the right to withdraw an award, or cancel a contract concluded with a Bidder should it be established, at any time, that a bidder has been blacklisted with National Treasury by another government institution.

30. GOVERNING LAW

South African law governs this bid and the bid response process. The bidder agrees to submit to the exclusive jurisdiction of the South African courts in any dispute of any

REQUEST FOR PROPOSAL NO.
Appointment of Travel Management Company
To Provide Travel Management Services to the National Department of Social Development
kind that may arise out of or in connection with the subject matter of this bid, the bid
itself and all processes associated with the bid.

31. RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL

A bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this bid. In the event that the Department of Social Development allows a bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the bidder and the Department of Social Development will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.

32. CONFIDENTIALITY

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this bid or a bidder's tender(s) will be disclosed by any bidder or other person not officially involved with the Department of Social Development's examination and evaluation of a Tender.

No part of the bid may be distributed, reproduced, stored or transmitted, in any form or by any means, electronic, photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a Tender. This bid and any other documents supplied by the Department of Social Development remain proprietary to the Department of Social Development and must be promptly returned to the Department of Social Development upon request together with all copies, electronic versions, excerpts or summaries thereof or work derived there from.

Throughout this bid process and thereafter, bidder(s) must secure the Department of Social Development's written approval prior to the release of any information that pertains to (i) the potential work or activities to which this bid relates; or (ii) the process which follows this bid. Failure to adhere to this requirement may result in disqualification from the bid process and civil action.

33. The Department of Social Development PROPRIETARY INFORMATION

Bidder will on their bid cover letter make declaration that they did not have access to any the Department of Social Development proprietary information or any other matter that may have unfairly placed that bidder in a preferential position in relation to any of the other bidder(s).

34. AVAILABILITY OF FUNDS

Should funds no longer be available to pay for the execution of the responsibilities of this bid **SD03/2025**, the Department of Social Development may terminate the Agreement at its own discretion or temporarily suspend all or part of the services by notice to the successful bidder who shall immediately make arrangements to stop the performance of the services and minimize further expenditure: Provided that the successful bidder shall thereupon be entitled to payment in full for the services delivered, up to the date of cancellation or suspension.



Annexure A2

DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

First Edition
January 2017

ANNEXURE A2: DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

The form must be submitted in File 1 (Technical file), Exhibit 2

EXAMPLE OF HOW THE BIDDER MUST COMPLETE THE COMPLIANCE CHECKLIST:

Section No	Technical Criteria	Reference page in Proposal	Comments
1.2	Experience of the bidder	Exhibit 2: Page 9 to 12	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
2.1	Manage all reservations and bookings	Exhibit 2: Page 13 to 15	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
2.2	Manage all refunds and non-refundable airline-tickets	Exhibit 2: Page 17 to 20	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.

EXAMPLE OF A RATING SCALE THAT BEC MEMBERS MAY USE

Rating	Definition	Score
Excellent	Exceeds the requirement. Exceptional demonstration by the supplier of the relevant ability, understanding, experience, skills, and resource and quality measures required to provide the goods / services. Response identifies factors that will offer potential added value, with supporting evidence.	5
Good	Satisfies the requirement with minor additional benefits . Above average demonstration by the supplier of the relevant ability, understanding, experience, skills, resource and	4

	quality measures required to provide the goods / services. Response identifies factors that will offer potential added value, with supporting evidence.	
Acceptable	Satisfies the requirement. Demonstration by the supplier of the relevant ability, understanding, experience, skills, resource, and quality measures required to provide the goods / services, with supporting evidence.	3
Minor Reservations	Satisfies the requirement with minor reservations . Some minor reservations of the supplier's relevant ability, understanding, experience, skills, and resource and quality measures required to provide the goods / services, with little or no supporting evidence.	2
Serious Reservations	Satisfies the requirement with major reservations . Considerable reservations of the supplier's relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services, with little or no supporting evidence.	1
Unacceptable	Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the supplier has the ability, understanding, experience, skills, resource & quality measures required to provide the goods / services, with little or no supporting evidence.	0



The Bidders will be evaluated according to the technical evaluation criteria in the scorecard below.

Bidders must indicate their ability to do the following and to substantiate as required with supporting documentation.

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION					
DESKTOP EVALUATION					
1	GENERAL	80	SECTION 15.3.2		
1.1	Demonstrate the /bidder's ability to execute the travel management services in a corporate and public sector-based environment by indicating minimum of three (3) successfully completed/running contracts NB: Each contract must have ran/completed a work for a period of at least 1 year The bidder must provide POE; at least three (3) minimum current or previous contracts. Reference letter under the client-company letter head that confirms that the Company is managing or has previously managed such contract. (Signed reference letters from the mentioned references confirming previous/current successful implementations should contain the	10	Section 15.3.1 (k)		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION					TO BE COMPLETED BY THE BIDDER
	<p>following detail: client's company name, name and position of person who may be contacted and telephone number, description of services and an indication of whether the project was successful.)</p> <p>I. 7 contracts and more: scores 5 II. 4-6 contracts: scores 4 III. 3 contracts: scores 3 IV. 2 contracts: scores 2</p> <p>1 contract: scores 1</p>				
1.2	<p>Bidders are required to submit 3 minimum confirmation letters with letterheads from hotels/lodges that they have healthy business relationships. (e.g. good standing)</p> <p>I. Good Business relation with 5 Hotels/lodges: scores 5 II. Good Business relation with 4 Hotel/lodges: scores 4 III. Good Business relation with 3 Hotel/lodges: scores 3 IV. Good Business relation with 2 Hotel/lodges: scores 2 V. Good Business relation with 1 Hotel/lodges: scores 1</p>	10			
1.3	<p>Bidders are required to submit confirmation signed letters with letterheads from the car rental companies that they have healthy business relationships. (good standing)</p> <p>I. Good Business relation with 5 car rental companies: scores 5 II. Good Business relation with 4 car rental companies: scores 4</p>	10			

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
	TO BE COMPLETED BY THE TENDERING INSTITUTION				
	III. Good Business relation with 3 car rental companies: scores 3 IV. Good Business relation with 2 car rental companies: scores 2 V. Good Business relation with 1 car rental companies: scores 1 NB: It must be noted that these are not the only suppliers booked for or on behalf of the DSD but rather are most frequently used suppliers.				

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
	TO BE COMPLETED BY THE TENDERING INSTITUTION				
2	RESERVATIONS	20	SECTION 15.3.2 TO 15.3.6		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION			TO BE COMPLETED BY THE BIDDER		
2.1	<p>Manage all reservations/ bookings.</p> <p>Describe how all travel reservations/ bookings are handled e.g. hotel (accommodation); car rental; flights, meetings, conferences, events etc.). Please specify if these bookings would be done by the TMC or outsourced etc.</p> <p>This will include, without limitation, an example of a detailed complex itinerary confirmation that includes air, car, hotel, passport requirement, confirmation numbers and additional proof of competency.</p>	5	<p>Section 15.3.2</p> <p>Section 15.3.3</p> <p>Section 15.3.4</p> <p>Section 15.3.5</p>		
2.2	<p>Directly negotiated rates</p> <p>Negotiated airline fares, accommodation establishment rates, car rental rates, etc., that are negotiated directly or established by National Treasury or by the Department of Social Development are non-commissionable, where commissions are earned for the Department of Social Development bookings, all these commissions should be returned to the Department of Social Development on a quarterly basis.</p> <p>Describe how these specific rates will be secured. Describe any automated tools that will</p>	5	Section 15.3.2 (q)		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION			TO BE COMPLETED BY THE BIDDER		
	be used to assist with maintenance and processing of the said negotiated rates.				
2.3	<p>Manage airline reservations.</p> <p>Describe in detail the process of booking the most cost-effective and practical routing for the traveller.</p> <p>This will include, without limitation, the refund process and how you manage the unused non-refundable airline tickets, your ability to secure special airline services for traveller(s) including preferred seating, waitlist clearance, special meals, travellers with disabilities, etc.</p>	5	Section 15.3.3		
2.4	<p>After-hours and emergency services</p> <p>The bidder must have capacity to provide reliable and consistent after hours and emergency support to traveller(s).</p> <p>Please provide details/ Standard Operating Procedure of your after-hour support e.g.</p> <ul style="list-style-type: none"> - how it is accessed by Travellers, - where it is located, centralized/ regionalised, in-country (owned)/ outsourced etc. 	5	Section 15.3.6		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION					
	<ul style="list-style-type: none"> - is it available 24/7/365 - Reminders to the Department of Social Development to process purchase orders within 24 hours to reduce queries on invoices 				
3	Technical Staff/Team	10			
3.1	<p>Composition of technical team to be utilized per region in the execution of the contract consist of the following professions:</p> <p>Attach copies of relevant CV's for each, clearly indicating a detailed profile of their previous work experience, with a minimum of three (3) years' relevant experience for each profession</p> <ul style="list-style-type: none"> a. Senior (dedicated) Consultant b. Dedicated team leader/s for consultant c. Intermediate (dedicated) Consultant d. Junior (dedicated) Consultant e. dedicated Admin Back Office (Creditors / Debtors/Finance Processors) for each region <p>The bidder must provide a minimum of five (5) Key professions with 3 years' experience each</p>	10			

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION			TO BE COMPLETED BY THE BIDDER		
	as per the below scores.				
	I. All required key professionals with 3 years' experience each as mentioned on par.15.: score 5				
	II. All required 5 key professionals with 3 years' experience each and additional 3 from par.15.: score 4				
	III. All five (5) key professions with 3 years' experience each listed above: scores 3				
	IV. Some but not all mentioned professionals with 3 years' experience each listed above: scored 2				
	V. 1 or no professionals mentioned: scored 1				
4	FINANCIAL MANAGEMENT	5	SECTION 15.5		
4.1	Describe how you will implement the negotiated rates and maximum allowable rates established either by the Department of Social Development or the National Treasury. Describe how you will manage the 30-day bill-back account facility. Describe how pre-payments will be handled where it is required for smaller Bed & Breakfast	5	Section 15.5		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION			TO BE COMPLETED BY THE BIDDER		
	<p>/Guest House facilities.</p> <p>Describe how invoicing will be handled, including the process of rectifying discrepancies between purchase orders and invoices, supporting documentation, reconciliation of transactions and the timely provision of invoices to the Department of Social Development.</p> <p>Please describe credit card reconciliation process, timing and deliverables (if applicable).</p>				
5	TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING	10	SECTION 15.6		
5.1	<p>Describe the proposed booking system e.g. Global Distribution System (GDS), Online Booking Tool (OBT) or Self-Booking tool (SBT).</p> <p>Describe how travel consultants access and book web airfares i.e. non-GDS inventories (low cost carriers/ consolidators), and hotel web rates.</p> <p>Describe how you will manage data and management information such as traveller profiles, tracking of savings and missed savings,</p>	10	Section 15.6		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION					TO BE COMPLETED BY THE BIDDER
	<p>tracking of unused airline tickets, cancellation, traveller behaviour, transaction level data, etc. (refer to the detail in Section 15.6.6)</p> <p>Give actual examples of standard reports that you currently have available. Give an indication if reports can be customised.</p> <p>Provide a description of all technology and reporting products proposed for the Department of Social Development.</p> <p>Can the TMC comply with the Department of Social Development's monthly reporting requirement as prescribed by National Treasury? See Monthly Reporting Template prescribed by National Treasury Instruction No 3 of 2016/17.</p> <p>Describe the compatibility of your online solution to fully integrate into the Department of Social Development's ERP. Indicate the turnaround time to complete this process and a breakdown of the expected cost that will be associated with it (in case the Department of Social Development decide to integrate)</p>				
6	ACCOUNT MANAGEMENT	5	SECTION 15.7		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION					TO BE COMPLETED BY THE BIDDER
6.1	<p>Provide the proposed Account Management structure / organogram.</p> <p>Describe what quality control procedures/ processes you have in place to ensure that your clients receive consistent quality service.</p> <p>Describe how queries, requests, changes and cancellations will be handled. What is your mitigation and issue resolution process? Please provide a detailed response indicating performance standards with respect to resolving service issues. Complaint handling procedure must be submitted.</p> <p>What is in place to ensure that the Department of Social Development's travel Policy is enforced.</p> <p>How will you manage the service levels in the SLA and how will you go about doing customer satisfaction surveys?</p> <p>Indicate what workshops/training will be provided to Travellers and /or Travel Bookers.</p>	5	<p>Section 15.7.1 and 15.7.2</p> <p>Section 15.7.3</p> <p>Section 15.7.4</p> <p>Section 15.7.5</p> <p>Section 15.7.6</p> <p>Section 15.7.7</p>		

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
TO BE COMPLETED BY THE TENDERING INSTITUTION					TO BE COMPLETED BY THE BIDDER
PRESENTATION		20			
140	<p>Part A: presentation must not exceed 90 minutes</p> <ul style="list-style-type: none"> - Summary of the proposal - Value added Services - Provide information on any value-added services that can be offered to the Department of Social Development. - Cost saving strategy - Describe and provide examples of cost savings initiatives implemented and achieved at previous clients. Indicate what items were targeted for maximum cost savings results. Describe how you will assist the Department of Social Development to realise cost savings on annual travel spend 				

#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
	TO BE COMPLETED BY THE TENDERING INSTITUTION			TO BE COMPLETED BY THE BIDDER	
	<ul style="list-style-type: none"> - How the TMC will assist with improving traveller behaviour. - Reference checks - Q&A on technical submission. 				

BIDDER DECLARATION (Section 22)

The bidder hereby declare the following:

We confirm that _____ (Bidder's Name) will: –

- a. Act honestly, fairly, and with due skill, care and diligence, in the interests of Department of Social Development;
- b. Employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- c. Act with circumspection and treat the Department of Social Development fairly in a situation of conflicting interests;
- d. Comply with all applicable statutory or common law requirements applicable to the conduct of business;
- e. Make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with the Department of Social Development;
- f. Avoid fraudulent and misleading advertising, canvassing and marketing;
- g. Conduct business activities with transparency and consistently uphold the interests and needs of the Department of Social Development as a client before any other consideration; and
- h. Ensure that any information acquired by the bidder(s) from the Department of Social Development will not be used or disclosed unless the written consent of the client has been obtained to do so.

Signature _____ Date _____

Print Name of Signatory: _____

Designation: _____

FOR AND ON BEHALF OF: _____ (Bidding Company's Name)

PRICING SCHEDULE
(Professional Services)

BID NO: SD03/2025

CLOSING TIME 11:00 ON 29 January 2026

NAME OF SERVICE PROVIDER:

OFFER TO BE VALID FOR 120 DAYS FROM THE CLOSING DATE OF BID.

ITEM NO	DESCRIPTION	BID PRICE IN RSA CURRENCY INCLUSIVE OF <u>VAVULE ADDED TAX</u>
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TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO RENDER OOF-SITE TRAVEL MANAGEMENT SERVICES TO THE DEPARTMENT OF SOCIAL DEVELOPMENT FOR A PERIOD OF 36 MONTHS

1. The accompanying information must be used for the formulation of proposals.

2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project.

R.....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

4. PERSON AND POSITION

HOURLY RATE

DAILY RATE

R.....

R.....

R.....

R.....

R.....

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

R..... days

R..... days

R..... days

R..... days

5.1 Travel expenses (specify, for example rate/km and total km, class of airtravel, etc). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED

RATE

QUANTITY

AMOUNT

..... R.....

..... R.....

..... R.....

..... R.....

TOTAL: R.....

Name of Bidder:

- 5.2 Other expenses, for example accommodation (specify, eg. Three star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
.....	R.....
.....	R.....
.....	R.....
.....	R.....
TOTAL: R.....			

6. Period required for commencement with project after acceptance of bid
.....
7. Estimated man-days for completion of project
.....
8. Are the rates quoted firm for the full period of contract?
*YES/NO
9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.
.....
.....
.....

Any enquiries regarding bidding procedures may be directed to the –

Mr. Zolisa Mantantana
Email: ZolisaM@dsd.gov.za



ANNEXURE A3

PRICING SUBMISSION

RFP NO:

National department of Social development: SD03/2025

RFP NAME:

THE PROVISION OF TRAVEL MANAGEMENT SERVICES FOR A PERIOD OF 36 MONTHS

BIDDER NAME

<NAME OF BIDDER TO BE FILLED IN HERE>

PRICE INSTRUCTIONS

1. STRUCTURE OF THE TENDER

This spreadsheet for **RFP/BID** _____ contains the financial response templates for the bid. The bid pricing submission instructions in this document must be read in conjunction with instructions or notes embedded in the various tabs of spreadsheet (Pricing Schedule).

2. GENERAL INSTRUCTIONS FOR COMPLETING THE PRICING SCHEDULE TEMPLATES

2.1 Tender submission format

- 2.1.1 Bidders must submit a paper copy **and an electronic copy** of the Pricing Schedule. In the event of a discrepancy, the paper copy will prevail.
- 2.1.2 Bidders must sign all paper copies of their Pricing Schedule.
- 2.1.3 Bidders must complete and submit the templates attached, which is/are **management fee model onsite and offsite, transactional fee model onsite and offsite**
- 2.1.4 Bidders must reference RFP/BID main document section 15.2 for current travel volumes.

2.2 Input spreadsheets

- 2.2.1 The Pricing Schedule templates are contained within the one (1) Excel Workbook
- 2.2.2 Bidders must not make any changes to the spreadsheets or change the formatting of the Pricing Schedule.
- 2.2.3 Cells are formatted to automatically indicate South African Rands, ordinary text fields and percentages (%) where applicable.
- 2.2.4 Input cells FOR BIDDERS are highlighted in **GREEN**. The Bidder must complete all the relevant input cells for the bid. No other cells must be changed in any way whatsoever.
- 2.2.4 Input cells FOR THE TENDERING INSTITUTION are highlighted in **ORANGE**. The tendering institution must complete all the relevant input cells for the bid. No other cells must be changed in any way whatsoever.

2.3 Currency and VAT

- 2.3.1 All Bidders' pricing must be quoted in South African Rands (ZAR).
- 2.3.3 The Pricing Schedule template is designed such that VAT will be calculated on Bidders' input pricing; therefore Bidders **must** complete the templates with **unit prices excluding VAT**.



TEMPLATE 2: TRANSACTION FEE MODEL OFF-SITE SERVICES

RFP NO:	National department of Social development: SD03/2025
RFP NAME:	THE PROVISION OF TRAVEL MANAGEMENT SERVICES FOR A PERIOD OF 36 MONTHS
BIDDER NAME	<NAME OF BIDDER TO BE FILLED IN HERE>

1.1 TRANSACTION FEES

ITEM	Transaction Type	Estimated Volume	TRADITIONAL BOOKINGS			ONLINE BOOKINGS		
			Unit Price (excl VAT)	Unit Price (incl VAT)	TOTAL Price (incl VAT)	Unit Price (excl VAT)	Unit Price (incl VAT)	TOTAL Price (incl VAT)
1	Air Travel – International	141		R -	R -		R -	R -
2	Air Travel – Regional			R -	R -		R -	R -
3	Air Travel – Domestic	7887		R -	R -		R -	R -
4	Air Travel – International (Re-issue)			R -	R -		R -	R -
5	Air Travel – Regional (Re-issue)			R -	R -		R -	R -
6	Air Travel – Domestic (Re-issue)			R -	R -		R -	R -
7	Refunds – Air Domestic			R -	R -		R -	R -
8	Refunds – Air Regional			R -	R -		R -	R -
9	Refunds – Air International			R -	R -		R -	R -
10	Car Rental – Domestic	2878		R -	R -		R -	R -
11	Car Rental – Regional			R -	R -		R -	R -
12	Car Rental – International			R -	R -		R -	R -
13	Transfers/Shuttle – Domestic	3839		R -	R -		R -	R -
14	Transfers/Shuttle – Regional			R -	R -		R -	R -
15	Transfers/Shuttle – International			R -	R -		R -	R -
16	Accommodation – Domestic	5694		R -	R -		R -	R -
17	Accommodation – Regional			R -	#VALUE!		R -	#VALUE!
18	Accommodation – International			R -	R -		R -	R -
19	Bus/Coach Bookings			R -	R -		R -	R -
20	Train bookings – International			R -	R -		R -	R -
21	Visa Assistance			R -	R -		R -	R -
22	(Provision of documents and advice)			R -	R -		R -	R -
23	Courier services for travel documentation			R -	R -		R -	R -
24	SMS Notifications			R -	R -		R -	R -
25	Parking bookings	677		R -	R -		R -	R -
26	Cancellations	1		R -	R -		R -	R -
27	Changes to bookings			R -	R -		R -	R -
28	After Hours Services	1883		R -	R -		R -	R -
29	Additional Ad-hoc Reports (per report)			R -	R -		R -	R -
30	Customised Reports (per report)			R -	R -		R -	R -
31	Travel Lodge card Reconciliation			R -	R -		R -	R -
32	Debtors Account Reconciliation			R -	R -		R -	R -
33	Other (Specify)			R -	R -		R -	R -
34	Other (Specify)			R -	R -		R -	R -
35	Other (Specify)			R -	R -		R -	R -
36	Other (Specify)			R -	R -		R -	R -
37	Other (Specify)			R -	R -		R -	R -
Total		23000			#VALUE!			#VALUE!
Percentage Split between Online Booking and Traditional Booking			Percentage Traditional	40.00%	#VALUE!	Percentage Online	60.00%	#VALUE!
PRICE THAT WILL BE USED FOR EVALUATION PURPOSES					#VALUE!			

1.2 CONFERENCE TRANSACTION FEE

Item	Description	Percentage Fee	Comment
1	Conference Transaction Fee (as a % of the Total turnover of the event)		



TEMPLATE 4: MANAGEMENT FEE MODEL OFF-SITE SERVICES

RFP NO:

National department of Social development: SD03/2025

RFP NAME:

THE PROVISION OF TRAVEL MANAGEMENT SERVICES FOR A PERIOD OF 36 MONTHS

BIDDER NAME

<NAME OF BIDDER TO BE FILLED IN HERE>

ESTIMATED TRANSACTION VOLUMES PER ANNUM *

See Section 15.2 of the bid document

1.1 MANAGEMENT FEES

		TRADITIONAL BOOKINGS		ONLINE BOOKINGS	
ITEM	Transaction Type		Annual Cost (Excl VAT)		Annual Cost (Excl VAT)
Fixed Costs (Management Fees)		Estimated #			
1	Compensation				
	Receptionist				
	Senior Travel Consultants				
	Intermediate Travel Consultants				
	Junior Travel Consultants				
	Travel Manager				
	Finance Manager / Accountant				
	Admin Back Office (Creditors/ Debtors /				
	Finance Processors				
	Strategic Account Manager				
	System Administrator				
2	Standard Monthly Reports (3 Std Reports x 12 months)				
3	Standard Weekly Reports (3 Weekly Report x 52 weeks)				
4	* Communication (SMS, Email alerts, Industry updates)				
5	Marketing				
6	Technology (Software Licences)				
7	Computing / GDS Fees				
8	Office Leasing (if applicable)				
9	Utility bills (phone, broadband, electricity, etc.				
10	Association membership fees				
11	Banking Services (Interest, Merchant Fees, etc.)				
12	Other (Specify)				
13	Other (Specify)				
14	Other (Specify)				
15	Other (Specify)				
16	Other (Specify)				
17	Profit				
Total Fixed Annual Cost (Excl VAT)			R -	R -	



		TRADITIONAL BOOKINGS		ONLINE BOOKINGS	
Variable Costs		Estimated #	Annual Cost (Excl VAT)	Annual Cost (Excl VAT)	
1	After-Hours (VIP/Executive Travel Consultant) (Estimated at 20 Calls per month After-Hours Call Center / Contact Number(17h00 - 8h00 Weekdays; 24 hours weekends and public holidays)	240			
2	(Estimated at 50 Calls per month	600			
3	Stationery (Estimated per annum)				
4	Training & Recruitment (own Staff estimated per annum)				
5	Other (Specify)				
6	Other (Specify)				
7	Other (Specify)				
8	Other (Specify)				
Total Variable Annual Cost (Excl VAT)			R -	R -	
TOTAL PER ANNUM (Excl VAT)			R -	R -	
Percentage Split between Online Booking and Traditional Booking			20.00%	80.00%	
			Percentage Traditional	Percentage Online	
SPLIT GRAND TOTAL PER ANNUM (Excl VAT)			0	0	
GRAND TOTAL PER ANNUM (Excl VAT)			R -		
GRAND TOTAL PER ANNUM (Incl VAT) (PRICE THAT WILL BE USED FOR EVALUATION PURPOSES)			R -		
MONTHLY MANAGEMENT FEE (Incl VAT)			R -		
	Cost of Additional items (per incident)	Unit Price (excl VAT)	Unit Price (incl VAT)		
1	Courier Services		R -	<i>These services will only be done on request from the Tendering Institution and will be invoiced accordingly.</i> <i>These costs are ADDITIONAL to the monthly Management Fee.</i> <i>These items will not be used for evaluation purposes.</i>	
2	Visa Services		R -		
3	Customised Reports (per report)		R -		
4	Other (Specify)		R -		
5	Other (Specify)		R -		
6	Other (Specify)		R -		
7	Other (Specify)		R -		
1.2 CONFERENCE TRANSACTION FEE					
Item	Description	Percentage Fee	Comment		
1	Conference Transaction Fee (as a % of the Total turnover of the event)				



RFP NO:	National department of Social develeopment: SD03/2025
RFP NAME:	THE PROVISION OF TRAVEL MANAGEMENT SERVICES FOR A PERIOD OF 36 MONTHS
BIDDER NAME	<NAME OF BIDDER TO BE FILLED IN HERE>

Price Declaration

Dear Sir/Madam,

Having read through and examined the Request For Proposal (RFP) Document, the General Conditions, The Requirement and all other Annexures to the RFP Document, we offer to provide **ON-SITE / OFF-SITE** travel management service to the **[institution name]** at the following total amounts (including VAT)

Template 1: Transaction Fee (On-Site)

R	-	(incl. VAT)	
---	---	-------------	--

In words:

Template 2: Transaction Fee (Off-Site)

#VALUE!	(incl. VAT)	
---------	-------------	--

In words:

Template 3: Management Fee (On-Site)

R	-	(incl. VAT)	
---	---	-------------	--

In words:

Template 4: Management Fee (Off-Site)

R	-	(incl. VAT)	
---	---	-------------	--

In words:



We undertake to hold this offer open for acceptance for a period of **180 days** from the date of submission of offers. We further undertake that upon final acceptance of our offer, we will commence with the provision of service when required to do so by the **[Institution Name]**

We understand that **[Institution Name]** are not bound to accept the lowest or any offer and that we must bear all costs which we have incurred in connection with preparing and submitting this bid.

We hereby undertake for the period during which this bid remains open for acceptance not to divulge to any persons, other than the persons to which the bid is submitted, any information relating to the submission of this bid or the details therein except where such is necessary for the submission of this bid.

Signature

Date

Print name of signatory:

Designation:

FOR AND ON BEHALF OF: **COMPANY NAME**

Tel No:

Fax No:

Cell No:

Email:.....

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Price Declaration

SBD 4

DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state¹, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favouritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where-
 - the bidder is employed by the state; and/or
 - the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.
2. **In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**
 - 2.1 Full Name of bidder or his or her representative:
 - 2.2 Identity Number:.....
 - 2.3 Position occupied in the Company (director, trustee, shareholder², member):
 - 2.4 Registration number of company, enterprise, close corporation, partnership agreement or trust:
 - 2.5 Tax Reference Number:
 - 2.6 VAT Registration Number:
 - 2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in paragraph 3 below.

¹"State" means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

²"Shareholder" means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder presently employed by the state? YES / NO

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member:

Name of state institution at which you or the person connected to the bidder is employed :

Position occupied in the state institution:

Any other particulars:

.....
.....
.....

2.7.2 If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector? YES / NO

2.7.2.1 If yes, did you attach proof of such authority to the bid document? YES / NO

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....
.....
.....

2.8 Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months? YES / NO

2.8.1 If so, furnish particulars:

.....
.....
.....

2.9 Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid? YES / NO

2.9.1 If so, furnish particulars.

.....

.....
.....

2.10 Are you, or any person connected with the bidder,
aware of any relationship (family, friend, other) between
any other bidder and any person employed by the state
who may be involved with the evaluation and or adjudication
of this bid?

YES/NO

2.10.1 If so, furnish particulars.

.....
.....
.....

2.11 Do you or any of the directors / trustees / shareholders / members
of the company have any interest in any other related companies
whether or not they are bidding for this contract?

YES/NO

2.11.1 If so, furnish particulars:

.....
.....
.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Income Tax Reference Number	State Employee Number / Persal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME SHOULD THIS
DECLARATION PROVE TO BE FALSE.

.....
Signature

.....
Date

.....
Position

.....
Name of bidder

November 2011



PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

This preference form must form part of all tenders invited. It contains general information and serves as a claim form for preference points for specific goals.

NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022

1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 To be completed by the organ of state

(delete whichever is not applicable for this tender).

- a) The applicable preference point system for this tender is the **90/10** preference point system.
- b) The applicable preference point system for this tender is the **80/20** preference point system.
- c) Either the **90/10 or 80/20 preference point system** will be applicable in this tender. The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

1.3 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

- (a) Price; and
- (b) Specific Goals.

1.4 To be completed by the organ of state:

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	
SPECIFIC GOALS	
Total points for Price and SPECIFIC GOALS	100

- 1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 1.6 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

2. DEFINITIONS

- (a) **“tender”** means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) **“price”** means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) **“rand value”** means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) **“tender for income-generating contracts”** means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) **“the Act”** means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS

A maximum of 80 or 90 points is allocated for price on the following basis:

$$Ps = 80 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right) \text{ or } Ps = 90 \left(1 - \frac{Pt - P_{min}}{P_{min}} \right)$$

80/20 or 90/10

Where

- Ps = Points scored for price of tender under consideration
- Pt = Price of tender under consideration
- Pmin = Price of lowest acceptable tender

3.2. FORMULAE FOR DISPOSAL OR LEASING OF STATE ASSETS AND INCOME GENERATING PROCUREMENT

3.2.1. POINTS AWARDED FOR PRICE

A maximum of 80 or 90 points is allocated for price on the following basis:

$$\begin{array}{ccc} 80/20 & \text{or} & 90/10 \\ P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) & \text{or} & P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) \end{array}$$

Where

- P_s = Points scored for price of tender under consideration
 P_t = Price of tender under consideration
 P_{max} = Price of highest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

- 4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:
- 4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—
- (a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or
 - (b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system,

then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

(Note to organs of state: Where either the 90/10 or 80/20 preference point system is applicable, corresponding points must also be indicated as such.

Note to tenderers: The tenderer must indicate how they claim points for each preference point system.)

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Number of points claimed (80/20 system) (To be completed by the tenderer)
Organisations which are 51% owned black people who are women	10	
Organisations which are 51% owned black people which are youth	5	
Entities Owned by People with disabilities	5	

DECLARATION WITH REGARD TO COMPANY/FIRM

4.3. Name of company/firm.....

4.4. Company registration number:

4.5. TYPE OF COMPANY/ FIRM

- ☐ Partnership/Joint Venture / Consortium
- ☐ One-person business/sole propriety
- ☐ Close corporation
- ☐ Public Company
- ☐ Personal Liability Company
- ☐ (Pty) Limited
- ☐ Non-Profit Company
- ☐ State Owned Company

[TICK APPLICABLE BOX]

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –
 - (a) disqualify the person from the tendering process;
 - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
 - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
 - (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
 - (e) forward the matter for criminal prosecution, if deemed necessary.

.....
SIGNATURE(S) OF TENDERER(S)

SURNAME AND NAME:

DATE:

ADDRESS:

.....

.....

.....

