

## REQUEST FOR PROPOSALS FOR TRAVEL MANAGEMENT AGENCY FOR THE MOSES KOTANE INSTITUTE

<b>Bid Number</b>	MKIQ28/2023
<b>Description</b>	Request for proposal (RFP) for the appointment of an accredited service provider for travel management services for a period of 24 months
<b>Physical Address</b>	Ground Floor, 29 South, 7 Umsinsi Junction, La Mercy, KwaZulu-Natal, 4399
<b>Closing date and time to submit proposals.</b>	4 September 2023 at 04:00pm
<b>Proposals and SCM queries must be emailed to:</b> Hand delivered submissions will <b>NOT</b> be accepted.	<a href="mailto:sinenhlanhla.ngqulunga@moseskotane.com">sinenhlanhla.ngqulunga@moseskotane.com</a>
<b>Technical queries must be emailed to:</b>	<a href="mailto:Nokuthula.shongwe@moseskotane.com">Nokuthula.shongwe@moseskotane.com</a>

### SUPPLIER INFORMATION

<b>Name of bidder</b>	
<b>Contact person</b>	
<b>Physical address</b>	
<b>Telephone number</b>	
<b>Cellphone number</b>	
<b>Email address</b>	



**a) Disclaimer**

- MKI reserves its right not to appoint.
- MKI reserves its right to negotiate the price with the winning bidder.

**b) Terms and Conditions**

- Proposals must be emailed by no later than **4 September 2023 at 16:00**. Proposals received after the closing time and date will not be considered.
- All prices must be all inclusive. Only firm prices will be accepted. Non-firm prices (including prices subject to rates of exchange variations will not be considered)
- Bid validity period: 90 days.
- Proposals will be evaluated on the 80/20 preference points system.



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## **1. INTRODUCTION**

The Moses Kotane Institute (MKI) is an entity of the KwaZulu-Natal Provincial Government through the Department of Economic Development, Tourism and Environmental Affairs (EDTEA) with a mandate to conduct world class research that responds to the needs of the provincial economy. It is against this background that the department requires effective, efficient logistical support in order to ensure that the strategic goals of the institute are met. MKI invites accredited service providers to submit proposals for Travel Management Services for the Moses Kotane Institute.

## **2. BACKGROUND**

The Moses Kotane Institute (MKI) requires service providers to provide booking arrangements for non-officials and officials (group and/individuals), as travelers within domestic and international travel venues for industry events and activities. Travel arrangements will consist of air travel, hotel accommodation, airport transfers, shuttle services and car rentals through the appointed service provider. MKI intends to carry out a procurement exercise to solicit proposals from accredited, experienced and professional travel agencies for the provision of travel and related services within government rates. MKI does not guarantee exclusive procurement from the Travel Management Company nor any minimum order or quantity of services. The Travel Management Company is expected to win over market share through its quality service and competitive prices.

## **3. PROJECT PURPOSE**

To establish an independent and objectives of travel management services for the organization in terms of Section 27 of the Treasury Regulations prescribed in terms of Section 76 of the PFMA. The appointed service provider is expected to carry out the mandate of travel management services function in terms of the MKI.

## **4. TRAVEL MANAGEMENT OBJECTIVES**

The purpose of this Request for Proposal (RFP) is to source proposals from potential bidder(s) for the appointment of a service provider to provide travel management services to the Moses Kotane Institute for a period of 24 months (two years).

## 5. SCOPE OF TRAVEL MANAGEMENT SERVICES WORK

	DESCRIPTION
1.	<p>The MKI requires a service provider for a period of twenty-four (24) months (02 Years) to offer Travel Management Services to the MKI Staff, Executive and Board members. The successful bidder must be able to offer the MKI the following:</p> <ul style="list-style-type: none"> <li>a. Provide MKI with the travel management services that are efficient, consistent, and reliable and will maintain a high level of satisfaction for the traveller in line with the service levels.</li> <li>b. Provide MKI with a dedicated key account executive that is suitably qualified for the duration of the contract.</li> <li>c. Achieve significant cost savings for MKI without compromising services tendered.</li> <li>d. Appropriately contain MKI risk and traveler risk.</li> </ul>
2.	<p><b>RESERVATIONS</b></p> <p>The Travel Management Company Will Offer the following reservations:</p> <ul style="list-style-type: none"> <li>a. Always Endeavour to make the most cost-effective comprehensive travel arrangements.</li> <li>b. Always endeavour to make travel arrangements expeditiously (i.e., 24 hours).</li> <li>c. Provide all travel requirements for destinations to which travelers will be travelling and advise the Traveller of alternative plans that are more cost effective and more convenient where necessary.</li> <li>d. Obtain a minimum of three (3) price comparisons for all travel requests</li> </ul>

	<p>where the routing or destination permits.</p> <ul style="list-style-type: none"> <li>e. Book the negotiated discounted fares and rates where possible.</li> <li>f. Must keep abreast and communicate timeously carrier schedule changes as well as all other alterations and new conditions affecting travel and make appropriate adjustments for any changes in travel prior to or during the traveller's official trip. When necessary, etickets and billing shall be modified and reissued to reflect these changes.</li> <li>g. Book parking facilities at the airports where required for the duration of the travel.</li> <li>h. Respond timely and process all queries, requests and authorized changes and cancellations timeously and accurately.</li> <li>i. Must be able to facilitate group bookings (e.g., for meetings, conferences, events, etc.)</li> <li>j. Must issue all necessary travel documents, itineraries, and vouchers timeously to Traveller(s) prior to departure dates.</li> <li>k. Advise the Traveller of all visa and inoculation requirements well in advance.</li> <li>l. Assist with the arrangement of foreign currency and the issuing of travel insurance for international trips where required.</li> <li>m. Note that, unless otherwise stated, all cases include domestic, regional, and international travel bookings.</li> <li>n. Negotiated airline fares, accommodation establishment rates, car rental rates, etc., that are negotiated directly or established by National Treasury or by MKI.</li> </ul>
<b>3.</b>	<b>AFTER HOURS AND EMERGENCY SERVICES</b>

	<ul style="list-style-type: none"> <li>a. The service provider must provide a consultant or team of consultants to assist travelers with after hours and any emergency reservations and any changes to travel plans.</li> <li>b. A dedicated consultant/s must be available to assist Travelers with after hour or emergency assistance.</li> <li>c. After hours' services must be provided from Monday to Friday outside the official hours (17h00 to 7h30) and twenty-four (24) hours on weekends and Public Holidays.</li> <li>d. A call-Centre facility or after hours contact number should be available to all travelers so that when required, unexpected changes to travel plans can be made and emergency bookings attended to.</li> <li>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 twenty-four (24) hours.</li> </ul>
<b>6.</b>	<p><b>PRICING SCHEDULE</b></p> <p>Include a detailed Pricing Schedule showing in detail the service fees for the following.</p> <ul style="list-style-type: none"> <li>a. Airline booking (Local, Regional &amp; International)</li> <li>b. Accommodation booking</li> <li>c. Car hire booking &amp; Shuttle Services</li> <li>d. Forex cost charge</li> <li>e. Conference venue booking</li> <li>f. After Hour Costs &amp;</li> <li>g. other cost</li> </ul>

7.	<p><b>TRAVEL VOLUMES</b></p> <p>The current MKI total number of employees is 43 (may vary in future) and volumes per annum including air travel, accommodation, car hire and conference for the financial year 2022/23 are 30 travels per month.</p>
8.	<p><b>BILLING/PAYMENT METHOD</b></p> <ul style="list-style-type: none"> <li>a. All payments will be made on confirmation of services rendered and submission of a valid tax invoice.</li> <li>b. Invoices should include the provided order number/after hours go ahead by the relevant authorized official(s)</li> <li>c. Travel agent must supply Moses Kotane Institute with a monthly statement, referenced by each invoice for the month.</li> <li>d. Invoices will be paid by MKI within 30 days after completion of services rendered.</li> </ul>

## 6. TERMS AND CONDITIONS

All costs and expenses incurred by the potential service providers relating to their project proposal will be borne by each respective service provider. Moses Kotane Institute is not liable to pay such costs and expenses or to reimburse or compensate service providers in the process under any circumstances, including the rejection of any proposal or the cancellation of this project.

6.1 Moses Kotane Institute reserves the right not to make an appointment from the proposals submitted.

6.2 Prospective service providers shall not issue any press release or other public announcement about details of their project proposal without the prior written approval of Moses Kotane Institute.

6.3 Prospective service providers should conduct a requirement gathering and analysis exercise for the development and deployment of the intranet site.

6.4 Any project proposals shall become the property of Moses Kotane Institute and shall not be returned.



## 7 MANDATORY REQUIREMENTS

7.1 Must be able to facilitate group bookings (e.g., for meetings, conferences, events, etc.)

**The bidder must provide evidence/proof in a form of a letter (2) from the bookings previously facilitated for group bookings.**

7.2 A minimum of 5 years' experience in providing travel management services for government and/or public entities.

7.3 Must assist with the arrangement of foreign currency and the issuing of travel insurance for international and local trips where required and emergency contact number.

**The bidder must provide evidence/proof on how they will assist with the arrangement of foreign currency and the issuing of travel insurance international and local trips.**

7.4 Must provide visa application services for all international travel.

7.5 Bidders must submit a detailed implementation plan with their proposal.

## 8 FINANCIAL PROPOSAL

The bidder is required to submit a company profile and a detailed implementation plan with applicable financial implications. Bidders are expected to only quote on the mentioned services inclusive of VAT where applicable.

## 9 MANDATORY COMPLIANCE REQUIREMENTS (to be submitted with the proposal)

9.1 Proof of registration on the Treasury Central Supplier Database (CSD).

9.2 CVS and certificates of a project leader

9.3 Valid tax clearance certificate / Pin.

9.4 Proof of company registration, where applicable.

9.5 Valid BBBEE certificate by a SANAS accredited agency/company or Sworn affidavit.

9.6 Bank letter confirming the company banking details.

9.7 Proof of accreditation by IATA

9.8 Supplier declaration form (attached hereinto).

9.9 Preference points claim form (attached here into)

*Note: Failure to comply with the above mandatory requirements will lead to disqualification.*



## **10 DURATION**

The successful bidder is required to provide travel management services for the period of 24 months. During the contract period, bidder will be responsible for ongoing monitoring and maintenance of the requested services.

## SUPPLIER DECLARATION OF INTEREST

1. Any legal person, including persons employed by the state<sup>1</sup>, 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 a price quotation, advertised competitive bid, limited bid or proposal). 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, shareholder<sup>2</sup>): .....
  - 2.4 Company Registration Number: .....
  - 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.

<sup>1</sup>“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.

<sup>2</sup>“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 attached 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 **YES / NO**

business with the state in the previous twelve months

2.8.1 If so, furnish particulars:

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

2.8.2 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 Reference Number	Tax Number	State Number	Employee / 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 IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
Signature

.....  
Date

.....  
Position

.....  
Name of bidder

## SBD 6.1. PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIALPROCUREMENT 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 APPLICABLES IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

### GENERAL CONDITIONS

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).

**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 80/20 preference point system.
- b) 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.

1.1. 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.

**To be completed by the organ of state**

The maximum points for this tender are allocated as follows:

	POINTS
PRICE	80
SPECIFIC GOALS	20
<b>Total points for Price and SPECIFIC GOALS</b>	<b>100</b>

- 1.1 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.

- 1.2 The organ of state reserves the right to request a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim regarding 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. FORMULATE 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:

<b>80/20</b>	<b>or</b>	<b>90/10</b>	
$P_s = 80 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$	<b>or</b>	$P_s = 90 \left( 1 - \frac{P_t - P_{min}}{P_{min}} \right)$	

Where

$P_s$

= Points scored for price of tender under consideration

$P_t$

= Price of tender under consideration

$P_{min}$

= 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:

80/20	or	90/10
$P_{s \max} = 80 \left( 1 + \frac{P_t - P_{\max}}{P_{\max}} \right)$	or	$P_s = 90 \left( 1 + \frac{P_t - P_{\max}}{P_{\max}} \right)$

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 (a) 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.**

***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)
51% Black owned enterprise	8	
51% Black female owned enterprise	6	
51% Youth owned enterprise	6	

#### 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
  - ☐ Company
  - ☐ (Pty) Limited
- [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 favorable 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:**

## 11 TECHNICAL EVALUATION

Bidders are expected to score a minimum of 80 points from the grid below to qualify for the next stage of evaluation.

CRITERIA	Maximum score	Evaluator's score	Comments
<b>Experience within travel management services</b> <i>5 years and above = 20</i> <i>Less than 5 years = 0</i>	20		
<b>Project leader experience with public sector</b> <i>5 years and above = 20</i> <i>Less than 5 years = 0</i>	20		
<b>Proof of accreditation by IATA</b>	20		
<b>Letter of good standing from the bank indicating the bank rating from the bank</b> A=20 points B=18 points C=15 points D=10 points	20		
<b>Reference letters from the current/previous clients</b> <i>3 reference letters = 20</i> <i>Less than 3 reference letters = 0</i>	20		
<b>Total</b>	<b>100</b>		