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All correspondence to be addressed to: The Chief Executive Officer

REQUEST FOR BID

RFB NO: 07-2025 DESCRIPTION: APPOINTMENT OF A PANEL FOR TRAVEL MANAGEMENT SERVICES FOR A PERIOD OF 24 MONTHS.

Compulsory Briefing session

Date: 28 August 2025

Time: 11:00am

Venue: Virtual via Teams

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Meeting ID: 351 207 598 909 5

Passcode: qt7yx9kY

The Bid must be submitted on the letterhead of your business and submitted not later than:

Date: 05 September 2025

Time :11hH00 AM

Venue: Corner Bonaero Drive and Cote D Azur Avenue, Kempton Park 1622, South Africa Diamond, and Precious Metal Regulator

The following conditions and requirements will apply:

- 1) Only bidders registered on the central supplier database (CSD) and with a CSD number will be considered for this tender, as this is a requirement from the National Treasury.
- 2) Copies of ID's & CIPC & Latest downloaded CSD full registration report.
- 3) Late responses will not be considered.

ISSUED BY:

**THE CHIEF EXECUTIVE OFFICER
SOUTH AFRICAN DIAMOND AND
PRECIOUS METALS REGULATOR
P.O. BOX 16001
DOORFONTEIN**

2028

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CONTACT

(SPECIFICATION)

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1. INTRODUCTION

The South African Diamond and Precious Metals Regulator (SADPMR) is a Schedule 3A PFMA entity established in terms of section 3 of the Diamonds Act, No.56 of 1986, as amended. The SADPMR derives its mandate from the Diamonds Act 1986 (as amended) and the Precious Metals Act, 2005 (Act No. 37 of 2005).

2. PURPOSE OF THIS REQUEST FOR BID (RFB)

The purpose of this Request for Bid (RFB) is to solicit proposals from potential Bidders for the provision of travel management services to SADPMR. The SADPMR wants to appoint a panel of service providers to form part of the Travel Management Companies.

This RFB document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidders required by SADPMR for the provision of travel management services.

This RFB does not constitute an offer to do business with SADPMR but merely serves as an invitation to prospective bidders to facilitate a requirements-based decision process.

3. 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. 17h30 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.

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.

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 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.

Panel refers to a pre-qualified list of vendors or individuals chosen to offer specific services for the travel needs of the SADPMR.

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 Government 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 SADPMR by a dedicated consultant to ensure a seamless travel experience.

4. LEGISLATIVE FRAMEWORK OF THE BID

4.1. Tax Legislation

- 4.1.1. Bidders must be compliant when submitting a proposal to SADPMR 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).
- 4.1.2. It is a condition of this bid that the tax matters of the successful bidders be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.
- 4.1.3. The Tax Compliance status requirements are also applicable to foreign bidders who wish to submit bids.
- 4.1.4. 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.
- 4.1.5. 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.
- 4.1.6. 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.

4.2. Procurement Legislation

SADPMR 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).

5. BRIEFING SESSION

A compulsory briefing and clarification session will be held virtually on teams on the **28th of August 2025** at 11:00am to clarify to bidders the scope and extent of work to be executed.

NB: It is highly recommended that potential bidders attend the briefing session.

6. TIMELINE OF THE BID PROCESS

The period of validity of tender and the withdrawal of offers, after the closing date and time is 90 days. The project timeframes of this bid are set out below:

Activity	Due Date
Advertisement of bid on Government e-tender portal	22 August 2025
Compulsory briefing and clarification session	28 August at 11:00am
Bid closing date	05 September 2025
Notice to Bidders	SADPMR will publish the bid outcome on the SADPMR website.

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

Any time or date in this bid is subject to change at SADPMR's discretion and bidders will be informed of such changes. The establishment of a time or date in this bid does not create an obligation on the part of SADPMR 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 SADPMR extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

7. CONTACT AND COMMUNICATION

- 7.1. Enquiries can be made in writing to **Mr. Mmoloki Makume** via email mmolokim@sadpmr.co.za and **Ms. Shalati Mabunda** shalatim@sadpmr.co.za
- 7.2. The delegated office of SADPMR may communicate with Bidders where clarity is sought in the bid proposal.
- 7.3. Any communication to an official or a person acting in an advisory capacity for SADPMR in respect of the bid between the closing date and the award of the bid by the Bidders is discouraged.
- 7.4. All communication between the Bidders and SADPMR must be done in writing.
- 7.5. Whilst all due care has been taken in connection with the preparation of this bid, SADPMR makes no representations or warranties that the content of the bid or any information communicated to or provided to Bidders during the bidding process is, or will be, accurate, current or complete. SADPMR and its employees and advisors will not be liable with respect to any information communicated which may not be accurate, current or complete.
- 7.6. If Bidders find or reasonably believe it has found any discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by SADPMR (other than minor clerical matters), the Bidders must promptly notify SADPMR in writing of such discrepancy, ambiguity, error or inconsistency in order to afford SADPMR an opportunity to consider what corrective action is necessary (if any).
- 7.7. Any actual discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by SADPMR will, if possible, be corrected and provided to all Bidders without attribution to the Bidders who provided the written notice.
- 7.8. All persons (including Bidders) 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.

8. LATE BIDS

Bids received after the closing date and time, at the address indicated in the bid documents, will not be considered and where practicable, will be returned unopened to the Bidders.

9. 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.

10. FRONTING

- 10.1. 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 condemns any form of fronting.
- 10.2. 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 SADPMR may have against the Bidder / contractor concerned.

11. DUE DILIGENCE

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

12. SUBMISSION OF BIDS

- 12.1. Bid documents must be placed in the tender box OR couriered to the aforesaid address on or before the closing date and time.

- 12.2. Bid documents will only be considered if received by SADPMR before the closing date and time, regardless of the method used to send or deliver such documents to SADPMR.
- 12.3. Bidders 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 **05 September 2025 @11:00 am** 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 & SPECIFIC GOALS)
Exhibit 1: Pre-qualification documents (Refer to Section 17.1 - Gate 0: Pre-qualification Criteria (Table 1))	Exhibit 1: Pricing Schedule (Refer to Section 16 – Pricing Model and Annexure A3 – Pricing Submission)
Exhibit 2: <ul style="list-style-type: none"> Technical Responses and Bidder Compliance Checklist for Technical Evaluation Supporting documents for technical responses. (Refer to Section 17.2 - Gate 1: Technical Evaluation Criteria) 	Exhibit 2: Evidence of specific goals i.e. black ownership, youth ownership, SMME etc ID copy & CIPC & CSD Registration Report
Exhibit 3: <ul style="list-style-type: none"> Draft Service Level Agreement (Refer to Section 19 – Service Level Agreement) 	
Exhibit 4: <ul style="list-style-type: none"> Company Profile Any other supplementary information 	

- 12.4. Bidders are requested to initial each page of the tender document on the bottom right-hand corner.

13. DURATION OF THE CONTRACT

The successful bidders will be appointed for a period of **24 (Twenty-four)** months.

14. SCOPE OF WORK

14.1. Background

SADPMR's primary objective in issuing this RFB is to enter into an agreement with the successful bidders who will achieve the following:

- Provide SADPMR with the travel management services that are consistent, reliable and maintain a high level of traveller satisfaction in line with the service level agreement.
- Achieve significant cost savings for SADPMR without any degradation in the services.
- Appropriately contain SADPMR's risk and traveller risk.

14.2. Travel Volumes

The current SADPMR total volumes per annum includes air travel, accommodation, car hire, shuttle services, travel insurance and conference hire. The table below details the number of transactions for the FY **2024/2025** as follows:

Service Category	Estimated Number of Transactions per FY	Estimated Expenditure per FY
Air travel – Domestic	50	254 473.28
Air Travel – Regional	5	352 763.26
Air Travel – International	25	1707 749.59
Car Rental – Domestic	21	71 187.29
Accommodation - Domestic	67	323 172.99
Accommodation - International	28	1675 911.04
Transfers - Domestic	82	92 898.72
Transfers - International	2	1 229.56
Bus/Coach bookings	1	31 030.00
Conferences/Events	2	212 790.76
Insurance	29	14 184.98

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 bidders 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 booked on behalf of SADPMR locally and internationally. This will include employees and contractors, consultants and clients where SADPMR is responsible for the arrangement and cost of travel.
- b. Provide travel management services during normal office hours (Monday to Friday 8h00 – 17:30h00) and provide after hours and emergency services as stipulated in paragraph 15.3.6.
- c. Familiarisation with SADPMR travel business processes.
- d. Assist with negotiating better deals with service providers.
- e. Familiarisation with SADPMR Travel Policy and implementations of controls to ensure compliance.
- f. Penalties incurred because 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.
- g. Provide a facility for SADPMR to update their travellers' profiles.
- h. Manage the third-party service providers by addressing service failures and complaints against these service providers.
- i. Consolidate all invoices from travel suppliers.
- j. Provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition.

14.3.2. **Reservations**

The Travel Management Companies will:

- a. Receive travel requests from travel bookers, respond with quotations (confirmations) and availability. Upon 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.
- b. Always endeavour to make the most cost-effective travel arrangements based on the request from the 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. Quotations received from service providers should be shared with SADPMR to ensure transparency prior to confirmation of services.
- 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. For urgent travel requests the TMC must provide response within 2-3 hours.
- 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).
- n. Note that, unless otherwise stated, all cases include domestic, regional and international travel bookings.
- o. Be required to facilitate Visa applications as requested by SADPMR and advise on countries where Visas are applicable.
- p. Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that are negotiated directly or established by National Treasury or by SADPMR are **non-commissionable**, where commissions are earned for SADPMR bookings all these commissions should be returned to SADPMR on a quarterly basis.

- q. Ensure confidentiality in respect of all travel arrangements and concerning all persons requested by SADPMR.
- r. Timeous submission of proof that services have been satisfactorily delivered (invoices) as per SADPMR's 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.
- h. The TMC will be responsible for the tracking and management of unused e-tickets as per agreement with the SADPMR 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 travel policy of SADPMR.

- 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 SADPMR's travel policy.
- d. Should there be no rate agreement in place in the destination, 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 SADPMR.
- e. Accommodation vouchers must be issued to all SADPMR travellers for accommodation bookings and must be invoiced to SADPMR as per arrangement. Such invoices must be supported by a copy of the original hotel accommodation charges.
- 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 SADPMR.
- 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 SADPMR 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. The TMC must ensure that all car rentals are accompanied by insurance against damages and/or accidents.
- e. For international travel the TMC may offer alternative ground transportation to the Traveller that may include rail, buses and transfers.

- f. The TMC will book transfers in line with the SADPMR Travel Policy with the appointed and/or alternative service providers. Transfers can also include bus and coach services.
- g. The TMC should manage shuttle companies on behalf of the SADPMR and ensure compliance with minimum standards. The TMC should also assist in negotiating better rates with relevant shuttle companies.
- h. 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 dedicated consultant or team of consultants to assist Travellers (including VIP/Executive Travellers) with after hours and emergency reservations and changes to travel plans.
- b. After hours' services must be provided from Monday to Friday outside the official hours (17h00 to 8h00) and twenty-four (24) hours on weekends and Public Holidays.
- c. 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.
- d. 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 will be required to conduct workshops and training sessions for Travel Bookers of SADPMR twice a year.
- 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 SADPMR 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 SADPMR 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 SADPMR for the services rendered.
- 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 SADPMR'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. All management information and data input must be accurate.
- 14.6.3. The TMC will be required to provide the SADPMR 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>

- 14.6.4. Reports must be accurate and be provided as per SADPMR'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).
- 14.6.5. SADPMR may request the TMC to provide additional management reports.
- 14.6.6. Reports must be available in an electronic format for example Microsoft Excel.
- 14.6.7. 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.
- 14.6.8. 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**

- 14.7.1. An Account Management structure should be put in place to respond to the needs and requirements of the SADPMR 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 SADPMR'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 SADPMR'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 SADPMR's Travel Policy is establishing a basis for a cost savings culture.

14.9.2. It is the obligation of the TMC Consultant to always advise on the most cost-effective option, 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 SADPMR'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 SADPMR travel activity in the previous three-month period. These reviews are comprehensive and presented to SADPMR's Procurement and Finance teams as part of the performance management reviews based on the service levels.

14.11. **Office Management**

14.11.1. The TMC to ensure high quality service to be delivered at all times to the SADPMR's travellers. The TMC is required to provide SADPMR 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
- h. System Administrator (General Admin)

14.12. Volume driven incentives

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

- i. No override commissions earned through SADPMR reservations will be paid to the TMCs.
- ii. An open book policy will apply, and any commissions earned through the SADPMR volumes will be reimbursed to SADPMR.
- iii. TMCs are to book these negotiated rates or the best fare available, whichever is the most cost effective for the institution.

15. EVALUATION AND SELECTION CRITERIA

SADPMR has set minimum standards (Gates) that bidders need to meet in order to be evaluated and selected as successful bidders. The minimum standards consist of the following:

Pre-qualification Criteria (Gate 0)	Technical Evaluation Criteria (Gate 1)	Price and Specific Goals Evaluation (Gate 2)
Bidders must submit all documents as outlined in paragraph 15.1 (Table 1) below. Only bidders that comply with ALL these criteria will proceed to Gate 1.	Bidders are required to achieve a minimum of 80 points out of 100 points to proceed to Gate 2 (Price and Specific goals).	Bidders will be evaluated out of 100 points and Gate 2 will only apply to bidders who have met and exceeded the threshold of 80 points.

15.1. Gate 0: Pre-qualification Criteria

Without limiting the generality of SADPMR's other critical requirements for this Bid, Bidders must submit the documents listed in **Table 1** below. All documents must be completed and signed by the duly authorised representative of the prospective Bidders. During this phase Bidders' responses will be evaluated based on compliance with the listed administration and mandatory bid requirements. The Bidders 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 – SBD 2	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.
Declaration of Interest – 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	<p>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.</p> <p>Submit proof of registration.</p>
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.

		ii. Where a bidding company is using a 3rd party IATA licence, proof of the agreement must be attached and copy of the certificate to that effect at closing date.
ASATA Certificate	YES	<p>i. Bidders are required to submit their Association of Southern African Travel Agents (ASATA) licence/ certificate (certified copy) at closing date.</p> <p>ii. Where a bidding company is using a 3rd party ASATA licence, proof of the agreement must be attached and copy of the certificate to that effect at closing date</p>
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

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:

- Desktop Technical Evaluation – Bidders will be evaluated out of 85 points and are required to achieve minimum threshold of 70 points of 85 points.
- Presentation and system demonstration – Bidders will be evaluated out of 15 points and are required to achieve minimum threshold of 10 points out of 15 points.
- The overall combined score must be equal or above 80 points in order to proceed to Gate 2 for Price and Specific Goals evaluations.

	REFERENCE PAGE IN BIDDERS' PROPOSAL	COMMENTS (IF ANY)
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FUNCTIONAL EVALUATION CRITERIA			TO BE COMPLETED BY THE BIDDER	
1	GENERAL	WEIGHT		
1.1	The bidder must provide a detailed plan for implementing the service without interruptions as stipulated under point 14.3.1. No plan=0 points. Non-detailed plan=5 points. Detailed plan without interruptions=10points.	10		
1.2	The bidders must provide signed reference letters from at least three (3) contactable existing/recent clients (within the past 3 years) which are at least of a similar size to SADPMR whom may be contacted for references. The letter must include company name, contact person, address, phone number, and duration of contract, value of the travel expenditure, a brief description of the services that you provided and the level of client satisfaction. 0-2 reference letters =0 points. 3 or more Reference letters =10 points	10		
2	Manage all reservations/ bookings.	WEIGHT		
2.1	Describe how all travel reservations/ bookings are handled e.g. hotel accommodation, flights, car hire, etc. This will include, without limitation, an example of a detailed itinerary confirmation that includes air, hotel, car hire, passport requirement, confirmation numbers. No description=0 points; Description with example=10 points	10		
2.2	After-hours and emergency services (is it available 24/7/365) The bidders must have the capacity to provide reliable and consistent after hours and emergency support to traveller(s). The bidders must provide details & Standard Operating Procedure of your after-after hour support, i.e. how it is accessed by Travelers/authorised person(s) and include contact details, where it is located, centralized/ regionalised, in-country (owned)/ outsourced etc. No details of after-hours and emergency =0 points; Either details or standard operating procedure = 5 points Details & standard operating procedure of the after-hours support =10 points	10		

3	COMMUNICATION	WEIGHT		
3.1	Describe how you will ensure that travel coordinators are informed of your travel booking and communication processes where the traveller, travel coordinator and travel management company will be linked in one smooth continuous workflow. No description = 0 points; Description of how to coordinate the booking = 5 points	5		
4	TECHNOLOGY, MANAGEMENT INFORMATION REPORTING	WEIGHT		
4.1	Describe the proposed booking system e.g. Global Distribution System (GDS), and reporting products proposed for the SADPMR. Describe how travel consultants access and book web airfares i.e. non-GDS inventories (low cost carriers/consolidators), and hotel web rates. No description of GDS = 0 points GDS with description = 10 points No descriptions of access = 0 points Descriptions of how consultants will access the booking = 10 points	20		
4.2	Describe how you will track savings, missed savings, unused airline tickets, cancellations, traveller behaviour and transaction level data, etc. No description = 0 points; Descriptions of the above = 5 points	5		
5	ACCOUNT MANAGEMENT	WEIGHT		
5.1	Describe what quality control procedures/ processes you have in place to ensure that your clients receive consistent quality service. Describe how you handle: queries, changes cancellations complaints What is your mitigation and issue resolution process? No description = 0 points; Description of all above = 5 points; Description with mitigation & resolution process = 10 points	10		
5.2	Describe in detail your 30-day bill-back account facility to be offered. No detailed description = 0 points; Detailed description = 5 points	5		

FUNCTIONAL EVALUATION TOTAL	85		
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Presentation evaluation criteria

1. No system = 0 points
2. Existing system = 5 points
3. System capability as per SADPMR service requirements = 5 points
4. System capability as per SADPMR invoice and reporting requirements 5 points

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	85	70
Presentation	15	10
OVERALL COMBINED POINTS	100	80

NB: BIDDERS WHO HAVE SCORED 80 AND ABOVE POINTS WILL BE CONSIDERED TO FORM PART OF THE PANEL.

16. SERVICE LEVEL AGREEMENT

- 16.1. Upon appointment SADPMR and the successful bidders will draft a Service Level Agreement regulating the specific terms and conditions applicable to the services being procured by SADPMR, in the format of the draft Service Level Indicators included in this tender pack.
- 16.2. SADPMR reserves the right to vary the proposed draft Service Level Agreement
- 16.3. Indicators during negotiations with a bidder by amending or adding thereto.
- 16.4. Awarded company will be 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.

16.5. SADPMR reserves the right to accept or reject any or all amendments or additions proposed by a bidder if such amendments or additions are unacceptable or pose a risk to the organisation.

16. SPECIAL CONDITIONS OF THIS BID

SADPMR reserves the right:

- 16.1. To negotiate with one or more preferred Bidders identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other Bidders who has not been awarded the status of the preferred Bidders.
- 16.2. To accept part of a tender rather than the whole tender.
- 16.3. To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the Bidders, whether before or after adjudication of the Bid.
- 16.4. 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.
- 16.5. 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 Bidders have been notified of their status as such.

16. SADPMR REQUIRES BIDDERS TO DECLARE

In the Bidder's Technical response, Bidders are required to declare the following:

- 16.1. Confirm that the Bidders is to: –
 - a. Act honestly, fairly, and with due skill, care and diligence, in the interests of SADPMR.
 - 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 SADPMR 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 SADPMR.
- 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 SADPMR as a client before any other consideration; and
- h. To ensure that any information acquired by the Bidders from SADPMR will not be used or disclosed unless the written consent of the client has been obtained to do so.

16. MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT

- 16.1. The bidder should note that the terms of its Tender will be incorporated in the proposed contract by reference and that SADPMR 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.
- 16.2. It follows therefore that misrepresentations in a Tender may give rise to service termination and a claim by SADPMR against the bidder notwithstanding the conclusion of the Service Level Agreement between SADPMR 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.

16. 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 SADPMR, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the Bidders in the preparation of their response to this bid.

16. INDEMNITY

If a bidder breaches the conditions of this bid and, as a result of that breach, SADPMR 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 SADPMR harmless from any and all such costs which SADPMR may incur and for any damages or losses SADPMR may suffer.

16. 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.

16. LIMITATION OF LIABILITY

A bidder participates in this bid process entirely at its own risk and cost. SADPMR 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.

16. TAX COMPLIANCE

No tender shall be awarded to a bidder who is not tax compliant. SADPMR 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 SADPMR, or whose verification against the Central Supplier Database (CSD) proves non-compliant. SADPMR 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.

16. 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. SADPMR 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.

16. 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 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.

16. 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 SADPMR allows a bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the bidder and SADPMR will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.

16. 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 SADPMR'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 SADPMR purpose of preparing a Tender. This bid and any other documents supplied by SADPMR remain proprietary to SADPMR and must be promptly returned to SADPMR upon request together with all copies, electronic versions, excerpts or summaries thereof or work derived there from.

Throughout this bid process and thereafter, Bidders must secure SADPMR'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.

16. SADPMR PROPRIETARY INFORMATION

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

16. AVAILABILITY OF FUNDS

Should funds no longer be available to pay for the execution of the responsibilities of this bid (RFB), the SADPMR 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



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All correspondence to be addressed to: The Chief Executive Officer

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.