

## **TERMS OF REFERENCE**

**CBE 2/2022:  
APPOINTMENT OF A SERVICE PROVIDER TO  
PROVIDE TRAVEL MANAGEMENT SERVICES TO  
THE CBE FOR A PERIOD OF 3 YEARS.**

## **1. BACKGROUND OF THE CBE**

The Council for the Built Environment (CBE) is a Schedule 3A Public Entity which reports to the National Department of Public Works and Infrastructure. The entity is a statutory body established under the Council for the Built Environment Act (No. 43 of 2000) (the CBE Act). It is an overarching body that coordinates the six Councils for the Built Environment Professions (Architecture, Landscape Architecture, Engineering, Property Valuers, Project and Construction Management, and Quantity Surveying). The objects under Section 3 of the CBE Act are to-

- a) promote and protect the interests of the public in the built environment;*
- b) promote and maintain a sustainable built environment and natural environment;*
- c) promote ongoing human resource development in the built environment;*
- d) facilitate participation by the built environment professions in integrated development in the context of national goals;*
- e) promote appropriate standards of health, safety and environmental protection within the built environment;*
- f) promote sound governance of the built environment professions;*
- g) promote liaison in the built environment in the field of training, both in the Republic and elsewhere, and to promote the standards of such training in the Republic;*
- h) serve as a forum where the representatives of the built environment professions may discuss the relevant required qualifications; standards of education; training and competence; promotion of professional status; and legislation impacting on the built environment.*
- i) ensure the uniform application of norms and guidelines set by the councils for the professions throughout the built environment.*

## **2. MAIN OBJECTIVE OF THIS PROJECT**

The objective of this project is to solicit proposals from potential bidders for the provision of travel management services to the CBE for a period of three years.

This bid document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidder required for the provision of travel management services to the CBE.

### 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. 17:00 to 08:00 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.

**B-BBEE** refers to Broad-Based Black Economic Empowerment.

**Car Rental** means the rental of a vehicle for a short time by a traveller for official purposes.

**CSD** means Central Supplier Database held at National Treasury.

**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.

**EME** means Exempted Micro Enterprise.

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

**GCC** means General Conditions of Contract.

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

**OBT** means Online Booking Tool.

**PPPFA** refers to the Preferential Procurement Policy Framework Act.

**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.

**SBD** means Standard Bidding Document

**Service Level Agreement (SLA)** is a contract between the TMC and CBE 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 for example, 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 CBE official, Council member or consultant travelling on official business on behalf of Government.

**Travel Authorisation** is the official form utilised by the CBE reflecting the details of the trip that is approved by the relevant authorising official.

**Travel Coordinator** 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 the CBE by a dedicated consultant to ensure a seamless travel experience.

## **4. SCOPE OF WORK**

### **4.1 Background**

The CBE is currently using a Travel Management Company (TMC) to manage its travel requirements on an off-site traditional basis. Presently the following process is in place:

- a) The traveller submits a travel requisition and the relevant supporting documents to the CBE travel co-ordinator.
- b) The CBE travel co-ordinator captures the requisition which goes through an approval workflow process and then through to the travel management company for the travel booking.

The CBE's primary objective in issuing this BID is to enter into agreement with a successful Bidder(s) who will achieve the following:

- a) Provide the CBE with the travel management services that are consistent and reliable; and maintain a high level of traveller satisfaction in line with service levels
- b) Achieve significant cost savings for the CBE without any degradation in the quality of service
- c) An added advantage will be the ability of the TMC to provide online and mobile booking and management services. Please submit evidence of a fully functional online and mobile booking system.

### **4.2 Travel Volumes**

The current CBE total volumes per month include air travel, accommodation, car hire, etc. The table below details the number of monthly transactions calculated over a 3 month period:

**Table 1: Travel Volumes**

<b>Service category</b>	<b>Number of transactions over a 3 month period</b>	<b>Expenditure calculated over a 3 month period</b>
Air travel – Domestic	28	R 156 388
Air Travel - Regional & International	No transaction during this period	No transaction during this period
Car Rental – Domestic	16	R 33 412
Car Rental - Regional & International	No transaction during this period	No transaction during this period
Shuttle Services – Domestic	No transaction during this period	No transaction during this period
Accommodation – Domestic	27	R 62 297
Accommodation - Regional & International	No transaction during this period	No transaction during this period
Transfers – Domestic	36	R 23 550
Transfers - Regional & International	No transaction during this period	No transaction during this period
Bus/Coach bookings	No transaction during this period	No transaction during this period
Train - Regional & International	No transaction during this period	No transaction during this period
Conferences/Events	No transaction during this period	No transaction during this period
<b>GRAND TOTAL</b>	<b>107</b>	<b>R 275 647</b>

Note: These figures are based on the current trends and may change during the tenure of the contract. The figures are meant for illustration purposes to assist Bidders to prepare their proposal. All service categories must be priced in accordance with Annexure B: Pricing Schedule.

## **4.3 Service Requirements**

### **4.3.1 General**

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

- a. Travel services will be provided to all travellers travelling on behalf of the CBE, locally and internationally. This will include employees, Council members, Consultants and any other individuals as approved by the CEO, where the agreement is that the CBE is responsible for the arrangement and cost of travel
- b. Travel management services during normal office hours (Monday to Friday 08:00 – 17:00) and provide after-hours and emergency services as stipulated in paragraph 4.3.6
- c. Familiarisation with current CBE travel business processes
- d. Familiarisation with current travel suppliers. Assist with further negotiations for better deals with travel service providers
- e. Familiarisation with current National Treasury Travel Policy and implementations of controls to ensure compliance
- f. 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
- g. A facility for the CBE to update their travellers' profiles. Bidders must strictly comply with the POPIA requirements in protecting the personal information of travellers.
- h. Manage third party service providers by addressing service failures and complaints against these service providers
- i. Consolidate all invoices from travel suppliers
- j. A detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition

### **4.3.2 Reservations**

The Travel Management Company will:

- a. receive travel requests from travel coordinators, 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 coordinator via the agreed communication medium

- b. always endeavour to make the most cost effective travel arrangements based on the request from the travel coordinator. Should the traveller source a cheaper booking than that proposed by the TMC, the latter must ensure that the cheaper rate is booked
- 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 as prescribed by National Treasury
- f. 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 to and process all queries, requests, changes and cancellations timeously and accurately
- i. issue all necessary travel documents (including boarding passes, itineraries and vouchers) timeously to traveller(s) prior to departure dates and times
- j. advise the traveller of all visa and inoculation requirements well in advance
- k. assist with the arrangement of foreign currency and the issuing of travel insurance for international trips where required
- l. facilitate any reservations that are not bookable on the Global Distribution System (GDS)
- m. facilitate the bookings that are generated through their own or third party Online Booking Tool (OBT) where it can be implemented



- n. note that, unless otherwise stated, all cases include domestic, regional and international travel bookings
- o. provide relevant visa information to traveller/s. 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 (such as baggage weight restrictions where they differ on the national and domestic routes of the same airline)
- p. negotiate airline fares, accommodation establishment rates, car rental rates etc. that are negotiated directly or established by National Treasury which are **non-commissionable**. Where commissions are earned for CBE bookings, these are to be returned to the CBE on a quarterly basis
- q. ensure confidentiality in respect of all travel arrangements and personal information concerning all persons requested by CBE
- r. timeous submission of proof that services have been satisfactorily delivered (invoices) as per CBE's instructions

#### **4.3.3 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 programme number of the traveller (if applicable).
- f. Airline tickets must be delivered electronically (SMS and/or email format) to the traveller(s) and travel coordinators promptly after booking before the departure times.
- g. The service provider will do the following on behalf of the traveller in respect of air travel:

- i. confirm the passenger's seat reservation
  - ii. confirm dietary preferences (if applicable)
  - iii. receive the boarding pass
  - iv. make the passenger aware of specific requirements e.g. baggage specifications, check in times etc. that vary from one airline to another (or from international to domestic)
  - v. update the passenger's loyalty/membership programmes
- h. 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.
- 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, meals included/excluded etc.)
- k. Assist with lounge access if and when required.

#### **4.3.4 Accommodation**

- a. The TMC will obtain three price comparisons from accommodation establishments that provide the best available rate within the maximum allowable rate as per the cost containment instruction of the National Treasury; and that is located as close as possible to the venue or office or location or destination of the traveller.
- b. 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 CBE's travel policy.
- c. The TMC will source suitable accommodation bearing in mind the requirement of convenience for the traveller and confirmation of acceptable costs, or as stipulated in written directives issued from time to time by the National Treasury. It is also expected of the TMC to recommend accommodation facilities that have been vetted post COVID by the former for quality with respect to food, hygiene etc.

- d. Accommodation vouchers must be issued to all CBE travellers for accommodation bookings; these must be invoiced to CBE as per arrangement. Such invoices must be supported by a copy of the hotel accommodation charges.
- e. 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.
- f. Cancellation of accommodation bookings must be done promptly to guard against no-show and late cancellation fees.

#### **4.3.5 Car Rental and Shuttle Services**

- a. The TMC will book the approved category vehicle in accordance with the CBE Travel Policy with the appointed car rental service provider from the closest rental location (airport, hotel and venue). The TMC must confirm the vehicle class/category booked.
- b. The travel consultant must confirm with the traveller on the best pick-up and drop-off times and pick-up and drop-off locations 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 (e-toll tags must be tested prior to vehicles being dispatched), 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 CBE Travel Policy. Transfers can also include bus and coach services.
- f. The TMC should manage shuttle companies on behalf of the CBE and ensure compliance with minimum standards. The TMC should also assist in negotiating better rates with relevant shuttle companies.
- g. The TMC must during their report period provide proof that negotiated rates were booked, where applicable.

#### **4.3.6 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-hours or emergency assistance.
- c. 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.
- d. A **responsive call centre facility or after-hours contact number** must be available to all travellers so that when required, unexpected changes to travel plans can be made and emergency bookings attended to.
- e. The TMC must have a standard operating procedure for managing after-hours and emergency services.

#### **4.4 Communication**

- 4.4.1 All enquiries must be investigated and prompt feedback be provided within three (3) working days in accordance with the SLA.
- 4.4.2 The SLA must make provision for a customer feedback survey to be issued by the TMC to the traveller and travel coordinator **after each travel** for levels of service to be ascertained.
- 4.4.3 The TMC must ensure sound communication with all stakeholders (link the business traveller, travel coordinator and TMC in one smooth continuous workflow).

#### **4.5 Financial Management**

- 4.5.1 The TMC must implement the discounted air fares and the maximum allowable rates established by the National Treasury where applicable.
- 4.5.2 The TMC will be responsible to manage the service provider accounts. This will include the timely receipt of invoices to be presented to the CBE for payment within the agreed time period.

- 4.5.3 The TMC will be required to offer a 30 day bill-back account facility to the CBE. 'Bill back', refers to the supplier sending the bill back to the TMC, who, in turn, invoices the CBE for the services rendered.
- 4.5.4 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.
- 4.5.5 Consolidate Travel Supplier bill-back invoices.
- 4.5.6 The TMC is responsible for the consolidation of invoices and supporting documentation to be provided to the CBE's Finance Department every second week. This includes attaching the Travel Authorisation and other supporting documentation to the invoices reflected on the Service provider's bill-back report.
- 4.5.7 Ensure Travel Supplier accounts are settled timeously.

#### **4.6 Technology and Reporting Requirements**

- 4.6.1 The implementation of an Online Booking Tool (OBT) to facilitate domestic bookings should be considered to optimise the services and related fees.
- 4.6.2 The TMC will be responsible for submitting a monthly Finance Report.
- 4.6.3 The Finance Report must incorporate the following:
  - a) creditor's ageing report
  - b) creditor's summary payments
  - c) daily invoices
  - d) no show report
  - e) cancellation report
  - f) receipt delivery report
  - g) refund log
  - h) open voucher report
  - i) open age invoice analysis
  - j) quantity of non-commissionable transactions and monetary value owed to the CBE

k) After-hours Report

- 4.6.4 The TMC will be responsible for the tracking and management of unused e-tickets as per agreement with the CBE and must be included on the above Finance Report.
- 4.6.5 The TMC must enable savings on total annual travel expenditure and this must be reported and proof provided in the Finance Report.
- 4.6.6 Report information must be available on a transactional level that reflect details including the name of the traveller, date of travel, spend category (example air travel, shuttle, accommodation).
- 4.6.7 Reports must be available in an electronic format.
- 4.6.8 Reports must be accurate and be provided as per CBE's requirements at the agreed time.
- 4.6.9 The TMC must 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.
- 4.6.10 More detailed information regarding the reporting requirements will be finalised with the successful Bidder at the inception meeting (if applicable).

**4.7 Account Management**

- 4.7.1 An Account Management structure should be put in place to respond to the needs and requirements of the CBE and act as a liaison for handling all matters with regard to delivery of services in terms of the contract.
- 4.7.2 The TMC must appoint a dedicated Account or Business Manager that is ultimately responsible for the management of the CBE's account.
- 4.7.3 The necessary processes should be implemented to ensure good quality management and ensuring traveller satisfaction at all times.
- 4.7.4 A complaint handling procedure must be implemented to manage and record the compliments and complaints of the TMC and other travel service providers.
- 4.7.5 Ensure that the CBE's Travel Policy is enforced.

4.7.6 The SLA must be managed and customer satisfaction surveys conducted to measure the performance of the TMC.

4.7.7 Ensure that workshops/training is provided to travellers and/or Travel Coordinators

#### **4.8 Value Added Services**

The TMC should provide the following value added services:

4.8.1 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
- xi. supplier updates

4.8.2 electronic voucher retrieval via web and smart phones

4.8.3 SMS notifications for travel confirmations

4.8.4 global travel risk management

4.8.5 VIP services for Executives that include check-in support

#### **4.9 Office Management**

4.9.1 The TMC is to ensure high quality service is delivered at all times to the CBE's travellers. The TMC is required to provide the CBE with highly skilled and qualified human resources of the following roles:

- a. Senior consultants

- b. Travel Manager (Operational)
- c. Account/Business Manager

## 5. REQUIRED QUALIFICATIONS AND EXPERIENCE

- 5.1 Bidders are required to have a professional membership with the Association of Southern African Travel Agents (ASATA) and the International Air Transport Association (IATA). 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.
- 5.2 Each of the following key resources must have a minimum of 5 years proven experience in the travel industry viz,
  - a. Senior consultants
  - b. Travel Manager (Operational)
  - c. Account/Business Manager

## 6. EVALUATION PROCESS

After the closing date, an appointed Bid Evaluation Committee will evaluate the proposals received. The following evaluation process shall be followed:

- 6.1 **Pre-qualification criteria (Bidders must meet the following pre-qualification criteria. Failure to meet these requirements shall result in the disqualification of your proposal):**
  - a) Potential service providers must be registered on the National Treasury Central Supplier Database (CSD). The CSD registration report must be submitted. Prospective bidders must be tax compliant. This bid will not be awarded to any



bidder who is not registered on the CSD, or whose tax matters are not in order and/or who is a restricted supplier.

- b) Only B-BBEE Level 1 and 2 contributors must submit a response to this bid. An original or originally certified copy of a correct and valid B-BBEE certificate (only SANAS accredited certificates will be accepted) OR an original valid sworn affidavit (whichever is applicable) must be submitted to confirm your B-BBEE status. Failure to submit a B-BBEE certificate or sworn affidavit will result in the disqualification of your bid. Failure to submit a correct and valid certificate or sworn affidavit will result in the disqualification of your bid. Any enquiries in respect of B-BBEE Status Level Verification Certificates may be directed to the B-BBEE Commission at 012-649 0918. Bidders must note that sworn affidavits must adhere to the requirements set out in The Broad Based Black Economic Empowerment Practice Guide 1 of 2018, Determining the validity of a Broad-based Black Economic Empowerment verification certificate, B-BBEE certificate and sworn affidavit, par 17 (Annexure A). (Please ensure that your affidavit complies with the requirements set out under this paragraph. If one or more requirements are not met, it will render the affidavit invalid).

**Special note: Bidders must please ensure that affidavits indicate the title of the deponent i.e. director or member or owner (please circle/underline the relevant title applicable to you); and the full financial year must be stated i.e. date, month and year (not only the calendar year). Your empowering supplier status must also be indicated.**

- c) Bidders are required to submit their ASATA licence/ certificate (certified copy) at closing date and time as proof of such membership.
- d) Bidders are required to submit their International Air Transport Association (IATA) licence/ certificate (certified copy) at the closing date and time. 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.

**\*\* The CBE reserves the right to verify the authenticity of the information submitted. The results of the verification will take precedence.**

## 6.2 Evaluation Phases:

- Phase 1: Functionality Evaluation

The service provider's proposal will be evaluated against the set criteria indicated under paragraph 5.3 below. A form will be used which will reflect the name of the service provider and the different criteria with space provided to record the points awarded and motivation for points awarded. The allocation of points will not be effected on a basis of consensus.

The following scoring matrix will be used:

Unable to evaluate	Does not comply with the requirements	Partial compliance with requirements	Full compliance with requirements	Exceeds requirements	Exceptionally exceeds requirements
0	1	2	3	4	5

The following formula will be used to convert the points scored against the weight:

$$P_s = \left( \frac{S_o}{M_s} \right) \times 100$$

Where:

$P_s$  = Percentage scored for functionality by proposal under consideration  
 $S_o$  = Total score of proposal under consideration  
 $M_s$  = Maximum possible score

Service providers will be expected to achieve a minimum threshold score of 65% in order to proceed for further evaluation.

A due diligence process will be conducted in respect of all short-listed Bidders to determine the capability and ability of short-listed Bidders to execute this contract.

The CBE reserves the right to utilise any one or more of the below due diligence methods:

- Presentation by bidders with pre-determined questions being posed by the CBE. A set of pre-determined questions based on the submitted proposal will be posed. This will be evaluated based on a grading scheme of either consistent or not consistent with the proposal. Should more than 20% of the responses not be consistent to the bidder's proposal their proposal will be disregarded.
- An investigation by the CBE of the bidder's previous contracts carried out, availability of skills or knowledge, existing workload
- Confirmation of the authenticity and content of the reference letters submitted (bidders must provide a minimum of two signed reference letters of the same work undertaken. Purchase orders will also be accepted, subject to the CBE verifying the authenticity of the information submitted).
- Presentation of the OBT etc.

CRITERIA	COMPLY (YES/NO)
User-friendliness	
Ability to do all bookings e.g. car, air, accommodation etc.	
Review & update traveller profiles	
Amend/cancel reservations	
Make special requests e.g. window seat on a flight, baby car seat etc	

Should more than 20% of the responses be non-compliant their proposal will be disregarded.

Should negative feedback be obtained from the aforementioned that will render the Bidder unsuitable to execute the assignment, their proposal will be disregarded at this point and they will not proceed for further evaluation.

It must be noted that if a service provider has previously undertaken work for the CBE to which a positive report is on record, such report may be used for the purpose of due diligence in the event that the selected method(s) above is/are unsuccessful.

Should the Bidder meet the requirements of due diligence, their proposal will proceed to Phase 2.

- Phase 2: Calculation of points

Please note that the proposals will be evaluated using the 80/20 preference point system where:

- 80 points are allocated for price
- 20 points are allocated for the service provider's B-BBEE Level of Contribution.

The CBE requires Bidders to utilise the transactional fee model to indicate their costing. Refer to Annexure B: Pricing Schedule (Off-site option). The percentage split between the traditional bookings versus the online booking is 70/30.

The transaction fee must be a fixed amount per service for the first year. During year 2 the transaction fee will be subject to a price adjustment. See Important Conditions below for further details.

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.

During Phase 2, points for price (price calculated on Annexure B) will be determined for all shortlisted service providers in accordance with the following formula:

$$P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

Where:

$P_s$  = Points scored for price of proposal under consideration

$P_t$  = Rand value of proposal under consideration

$P_{min}$  = Rand value of lowest acceptable proposal

**The final points will be calculated as follows:**

Points for price: 80 points

B-BBEE Status Level of Contribution: 20 points

Final points: 100 points

In accordance with section 2(1)(f) of the Preferential Procurement Policy Framework Act, 2000, the CBE reserves the right to apply the following objective criteria, based on current case law, in determining the final outcome of the award irrespective of which bidder scores the highest final points:

- (1) the rotation of contracts amongst suppliers; following two (2) awards by the CBE to the same supplier within a period of 24 months
- (2) protection of the environment

A recommendation for award will then be formulated for approval by the relevant delegated authority.

## 6.3 Evaluation Criteria

The following criteria and weights shall apply when evaluating the proposals.

CRITERIA FOR FUNCTIONALITY	WEIGHT	SCORING GUIDELINE
<p><b>Experience of team members</b></p> <p>Please provide condensed CVs of the following proposed human resources illustrating a minimum of 5 years proven experience in the travel industry:</p> <ol style="list-style-type: none"> <li>1. Senior consultants</li> <li>2. Travel Manager (Operational)</li> <li>3. Account/Business Manager</li> </ol> <p>Each resource's experience will be scored separately and then be averaged to give a final score (score will be rounded off to the nearest 2 decimal places (where applicable)).</p>	20	<p>0 = Less than 12 months of experience</p> <p>1 = 1-2 years</p> <p>2 = 3-4 years</p> <p>3 = 5 years</p> <p>4 = 6-9 years</p> <p>5 = 10+ years</p>
<p><b>Financial Stability</b></p> <p>Provide audited annual financial statements of the last financial year. The liquidity ratio of the business will be evaluated to determine whether the bidder can meet its current financial obligations.</p> <p>A letter from the bank confirming that the business account is being conducted in a satisfactory manner will be an added advantage; and an additional point will be allocated. The additional point will not be allocated if a bidder has already achieved a score of 5.</p>	20	<p>0 = Liquidity ratio of &lt;0.5</p> <p>1 = Liquidity ratio of 0.5</p> <p>2 = Liquidity ratio of 0.6 - 1</p> <p>3 = Liquidity ratio of 1.1 – 1.5</p> <p>4 = Liquidity ratio of 1.6 - 2</p> <p>5 = Liquidity ratio of more than 2</p>
<p><b>Reservations</b></p> <p>Indicate the turnaround times for responding to a request for quotation from the travel coordinators.</p> <p>Please submit your company's standard operating procedures.</p>	15	<p>0 = anything above 16 working hours</p> <p>1 = within 16 working hours</p> <p>2 = within 8 working hours</p> <p>3 = within 4 working hours</p> <p>4 = within 2 working hours</p> <p>5 = within 1 working hour</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.</p>	10	<p>0 = no information provided</p> <p>1 = information provided on performance standards does not address how service issues will be resolved</p> <p>2 = inadequate performance standards provided in resolving service issues</p>

		<p>3 = Detailed performance standards provided in resolving service issues timeously and efficiently.</p> <p>4 = Performance standards indicated exceed expectations.</p> <p>5 = Performance standards indicated exceptionally exceeds expectations.</p>
<p><b>After-hours and emergency services</b></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-hours support.</p>	15	<p>0 = no information provided</p> <p>1 = standard operating procedures do not address after-hours and emergency services</p> <p>2 = inadequate standard operating procedures provided for after-hours and emergency services</p> <p>3 = Detailed standard operating procedures provided for after-hours and emergency services</p> <p>4 = Standard operating procedures exceed expectations.</p> <p>5 = Standard operating procedures exceptionally exceeds expectations.</p>
<p><b>Technology Requirements</b></p> <p>Demonstrate evidence of a fully functional Online Booking Tool (OBT) for the CBE Travel Coordinator with respect to the following:</p> <ul style="list-style-type: none"> <li>• User-friendliness</li> <li>• Ability to do all bookings e.g. car, air, accommodation etc.</li> <li>• Review &amp; update traveller profiles</li> <li>• Amend/cancel reservations</li> <li>• Make special requests e.g. window seat on a flight, baby car seat etc.</li> </ul> <p>Demonstrate evidence of a fully functional mobile travel app for the traveller with respect to the following:</p> <ul style="list-style-type: none"> <li>• User-friendliness</li> <li>• Access to full details of confirmed reservations</li> <li>• Ability to do a self-check in for flights</li> </ul>	<p>5</p> <p>5</p>	<p>0 = no information provided</p> <p>1 = evidence of an online booking tool but no presentation submitted.</p> <p>2 = online booking tool partially meets requirement.</p> <p>3 = online booking tool meets all requirements</p> <p>4 = online booking tool offers an additional feature not specified on requirements.</p> <p>5 = online booking tool offers two or more additional features not specified on requirements.</p> <p>0 = no information provided</p> <p>1 = evidence of mobile travel app but no presentation submitted.</p> <p>2 = mobile travel app partially meets requirement.</p> <p>3 = mobile travel app meets all requirements</p> <p>4 = mobile travel app offers an additional feature not specified on requirements.</p> <p>5 = mobile travel app offers two or more additional features not specified on requirements.</p>

<b>Provide a Power point presentation of both the OBT and mobile travel app on a USB.</b>		
<b>Empowering Supplier</b>	10	0 = No information submitted 3 = More than 51% black owned entity 4 = 100% Black owned entity 5 = 100% black female/ youth owned entity  An additional point will be allocated if an entity has demonstrated that it has a disabled employee(s) or is owned by disabled persons.
<b>Total</b>	<b>100</b>	
<b>Threshold Score</b>	<b>65%</b>	

## 7. IMPORTANT CONDITIONS OF BID

- Protection of Personal Information - All bidders agree that personal information of persons related to or linked with bidders or respondents to this Bid for quotations/request for proposals or tender document is/may be required to fulfil the requirements for submitting a bid. All bidders agree that the CBE may collect, keep and process such information provided that the aforesaid uses shall be for purposes of evaluating the bid submitted. Where the information is sought to be used for other purposes, further and specific consent shall be obtained.
- Bidders shall note that any personal information that they may disclose to or share with the CBE pursuant to this Bid may be processed by the CBE in terms of the Protection of Personal Information Act, No.4 of 2013 and Regulations promulgated thereunder ("POPI Act"). By disclosing or sharing any personal information, the bidder is unconditionally consenting to the processing thereof by the CBE, its stakeholders or partners of such personal information for purposes related to this request/Bid. Further, the bidder declares all consents required by the POPI Act or any other law applicable in respect of all personal information disclosed has been duly and legally obtained. Thus, the bidder hereby indemnifies the CBE against any civil or criminal action, administrative fine or other penalty or loss that may arise as a result of the processing of any personal information disclosed to the CBE pursuant hereto.



- Service providers are required to submit a detailed breakdown of their pricing as per Annexure B: Pricing Schedule (Off-site option).
- Pricing must be inclusive of VAT (if VAT registered). 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

1. STATS SA P0141 (CPI), Table E	2. Table E - All Items
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- All Supply Chain Management compliant (required) documents must be completed in full and submitted. These include SBD 1, 4 and 6.1.
- Bidders must submit the company registration documents (CIPC), share certificate and ID documents of all Directors.
- Any award made to a Bidder under this proposal is conditional upon the Bidder accepting the terms and conditions contained in the General Conditions of Contract as the minimum terms and conditions upon which the CBE is prepared to enter into a contract with the successful Bidder.
- The General Conditions of Contract (GCC) are to be acknowledged and returned with your bid.
- All parties forming a joint venture or consortium for the purpose of this assignment must submit a separate CSD report for each party and all SBD forms and GCC must be completed by each party to the joint venture or consortium and submitted accordingly.
- Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements (where applicable). The CBE 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.
- Upon award the CBE and the successful Bidder will conclude a Service Level Agreement regulating the specific terms and conditions applicable to the services being procured by the CBE.

- The CBE reserves the right to disregard a bidders' proposal should it be found that work was previously undertaken for the entity to which poor performance was noted during the execution of such contract that subsequently led to the cancellation of said contract in the last five years. Documentary evidence of poor performance without a cancellation of the contract may also result in the disqualification of the bidders' proposal.
- Any communication between the closing date and the award of the proposal by Bidders is discouraged.
- Whilst all due care has been taken in connection with the preparation of this proposal, the CBE makes no representations or warranties that the content of the proposal or any information communicated to or provided to Bidders during the bidding process is, or will be, accurate, current or complete. The CBE and its employees and advisors will not be liable with respect to any information communicated which may not be accurate, current or complete.
- If a Bidder(s) finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this proposal or any other information provided by the CBE (other than minor clerical matters), the Bidder(s) must promptly notify the CBE in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the CBE an opportunity to consider what corrective action is necessary (if any).
- Any actual discrepancy, ambiguity, error or inconsistency in the proposal or any other information provided by the CBE will, if possible, be corrected and provided to all Bidders without attribution to the Bidder(s) who provided the written notice.
- 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 proposals.
- The CBE supports the spirit of broad based black economic empowerment and recognises 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 CBE condemns any form of fronting.
- The CBE, in ensuring that Bidders conduct themselves in an honest manner may, as part of the evaluation process, 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 proposal / 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 CBE may have against the Bidder / contractor concerned.

- 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 CBE allows a Bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the Bidder and the CBE will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.
- Bidders 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 are extracts from the PPPFA Act:
  - a) 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 Exempted Micro Enterprise (EME) that has the capability and ability to execute the sub-contract.”
  - b) 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.”
- If a Bidder breaches the conditions of this proposal and, as a result of that breach, the CBE 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 CBE harmless from any and all such costs which the CBE may incur and for any damages or losses the CBE may suffer.

- **Proposals must be emailed to [renusha@cbe.org.za](mailto:renusha@cbe.org.za). Bidder(s) are required to submit their technical and pricing proposal as two separate files/attachments.** Bidders must please note that the CBE server can receive files to a maximum size limit of 150mb (inclusive of message content and attachment). Should files exceed this size limit, bidders may either send their files in separate emails or alternatively compress the files and submit.
- The original or originally certified BBEE Certificates or original sworn affidavits must be hand delivered to 169 Corobay Avenue, Corobay Corner (Block A – 2nd Floor), Menlyn, Pretoria and deposited into the bid box before the closing time and closing date.
- It is the responsibility of prospective bidders to ensure that their proposal documents are submitted before the closing date and time of the proposal.
- Proposals received after the closing time and date will not be considered for evaluation.
- The CBE reserves the right not to award this contract.
- The CBE will enter into a formal contract with the successful bidder.
- Any change of information provided in the bid document that may affect service delivery by the successful bidder must be brought to CBE's attention as soon as possible. Failure to comply may result in the contract being terminated.
- Should the bidder present information intentionally incorrectly/fraudulently their proposal will be disqualified.
- It must be noted that payment will be made upon satisfactory delivery of the service and receipt of an invoice.
- The invoice will be paid within 30 days of receipt thereof. No deposit, advance and lump-sum payments will be made. A shorter payment period may be agreed upon by the CBE and the successful supplier and a supplier development agreement will be signed in this regard. To be considered for the shorter payment period the service provider must meet the following requirements:
  - ✓ Be at least 51% black owned.
  - ✓ Be an Exempt Micro Enterprise (EME) (Turnover under R10 million) or a Qualifying Small Enterprise (QSE) (Turnover less than R50 million), subject to the specific Sector Code.

- The closing date for submission of proposals is **10 November 2022 at 11:00am**.
- Proposals will be valid for a period of **150 days** after the closing date of the proposal.

**\*\* Special Note: The CBE reserves the right not to award two contracts that are in direct conflict with each other to the same service provider.**

## **8. ENQUIRIES**

All queries must be directed to the relevant officials as follows:

### **Supply Chain Management:**

Procurement Specialist

Mrs R. Nanthlall Ganesh

Tel: 087 058 5481

Email: [renusha@cbe.org.za](mailto:renusha@cbe.org.za)

### **Technical:**

Skills Development Practitioner

Mr J. Komane

Tel: 087 058 5481

Email: [joseph@cbe.org.za](mailto:joseph@cbe.org.za)