



SOUTH AFRICAN TOURISM

PART C: TENDER EVALUATION PROCESS - (SAT TUNDER NUMBER 183/21 TRAVEL MANAGEMENT COMPANY)

Summary of the Evaluation Phases:

Phase 1 Administrative and Mandatory bid requirements	Phase 2 Technical Evaluation Criteria	Phase 3 Price and B-BBEE Evaluation
<p>Bidders must complete and submit all documents as outlined under paragraph in order to proceed to Phase 2.</p>	<p>Technical functional evaluation (functionality) is divided in two (2) phases (Desktop technical functional evaluation and Presentation & Online booking tool demonstration technical functional evaluation with total points of 100)</p> <p>1. Phase 2. A: Desktop technical functional evaluation = 25 points minimum threshold:</p> <ul style="list-style-type: none"> A bidder must meet a minimum threshold of desktop technical functional evaluation in order to be considered to the next phase of evaluation, Phase 2.B (Presentation and Online booking tool demonstration technical functional evaluation). Failure to meet the minimum points threshold will result to disqualification on this phase <p>2. Phase 2. B Presentation & online booking tool demonstration technical evaluation = 45 points minimum threshold:</p> <ul style="list-style-type: none"> A bidder must meet the minimum threshold of Phase 2 B functional evaluation in order to be considered to the next phase of evaluation, Phase 3 (Price and BEE) <p><i>Failure to meet the minimum will result to disqualification on this phase</i></p>	<p>The tender will be evaluated on either the 80/20 or 90/10 preference point system. Once a tender is received, the lowest acceptable tender will be used to determine the preference point system to be used for the evaluation. Where the lowest acceptable tender is below R50 million, the 80/20 preference point system must be used and If the lowest acceptable tender is above R50 million, the 90/10 preference point system must be used.</p>

Phase 1: Administrative and Mandatory bid requirements

Without limiting the generality of South African Tourism's other critical requirements for this Bid, bidder(s) must submit all the documents required.

All documents must be completed and signed by the duly authorised representative of the prospective bidder(s). During this phase, bidders' responses will be evaluated based on compliance with the listed administrative and mandatory bid requirements. The bidder(s) proposal will be disqualified for non-submission of some or any of the documents.

Document that must be submitted	YES/NO	Non-submission may result in disqualification?
Confirmation of valid Tax Status		Written confirmation that SARS may, on an ongoing basis during the tenure of the contract, disclose the bidder's tax compliance status. SARS Tax Compliance System Pin
B - BBE Certificate 1		B - BBE Certificate (South African Companies) or, for companies that have less than R10 million turnover, a sworn affidavit or is required. A copy of the template for this affidavit is available on the Department of Trade and Industry website https://www.thedti.gov.za/gazette/Affidavit_EME.pdf (Failure to submit sworn affidavit will result in non-compliant on preference points system) (South African Companies only)
Annexure A-Invitation (SBD 1)		Complete and sign the supplied pro forma document
Annexure B-Registration on Central Supplier Database (CSD)		All agencies including proposed partner/subcontractor agencies must be registered as a service provider on National Treasury's Central Supplier Database (CSD). If you are not registered proceed to complete the registration of your company prior to submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Submit proof of registration. (South African Companies only)
Annexure E-Declaration of Interest - SBD 4)		Complete and sign the supplied pro forma document
Annexure D-Preferential Procurement SBD 6.1		Complete and sign the supplied pro forma document
Annexure F-Declaration of Bidder's Past Supply Chain Management Practices - SBD 8		Complete and sign the supplied pro forma document
Annexure G-Certificate of Independent Bid Determination - SBD 9		Complete and sign the supplied pro forma document
IATA License		Valid IATA (International Air Transport Association) licence

Phase 2: Technical Functional Evaluation Criteria = Weighting out of 100 basis points

All bidders are required to respond to the technical evaluation criteria scorecard and provide information/portfolio of evidence that they unconditionally hold the available capacity, ability, experience, and qualified staff to provide the requisite business requirements to South African Tourism under this tender.

The technical functional evaluation (functionality) will comprise of two (2) phases:

Phase 2.A will measure the responsiveness of proposals as per submission on or before closing date and time and Phase 2.B will comprise of presentation & online booking tool system demonstration technical functional evaluation

Phase 2 A Desktop technical functional evaluation- A bidder will be evaluated out of **40 points** and are required to score minimum threshold of **25 points out of 40 points** to qualify for presentation and online booking tool demonstration on Phase 2.B

Phase 2 B Presentation and Online booking tool Demo-A bidder will be evaluated out of **60 points** and are required to score a minimum threshold of **45 points out of 60 points** to be evaluated further on the next phase of evaluation (Price and B-BBEE).

TO BE COMPLETED BY THE TENDERING INSTITUTION			
2	Phase 2 A Desktop Technical Evaluation Criterion	Weight	Reference in Bid Document
	Points allocation will be full points on satisfactory of the below criterion or none scoring of points for failure to submit satisfactory information.		
2. 1	GENERAL	10	
2.1.1	Provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition.	3	
2.1.2	Provide the reference letters from at least three (3) contactable existing/recent clients (within past 3 year from the closing date of the bid) which are of a similar size to SA Tourism whom we may contact for references. This should include where you have or are delivering corporate travel including sourcing for DMC services	3	
2.1.3	ASATA (Association of South African Travel Agents) Membership. Provide proof of such membership.	2	
2.1.4	Demonstrate how you will assist SA Tourism, where possible, with the implementation of the Preferential Procurement Regulations, 2017 issued in terms of section 5 of the Preferential Procurement Policy Framework Act, Act Number 5 of 2000 (PPPFA) when procuring services from 3 rd party suppliers on behalf of SA Tourism.	2	
2.1.2	COMMUNICATION	2	
2.1.2.1	Describe how you will ensure that travel bookers are informed of the travel booking processes.	2	
	Describe your communication process where the traveller, travel coordinator/booker and travel management company will be linked in one smooth continuous workflow.		
2.1.3	FINANCIAL MANAGEMENT	10	
2.1.3.1	Describe how you will implement the negotiated rates and maximum allowable rates established either by the SA Tourism or the National Treasury.	10	
	Describe how you will manage the 30-day bill-back account facility.		
	Describe how pre-payments will be handled where it is required for smaller Bed & Breakfast /Guest House facilities and SMME's .		
	Describe how invoicing will be handled, including the process of rectifying discrepancies between purchase orders and invoices, supporting documentation, reconciliation of transactions and the timely provision of invoices to SA Tourism		
	Please describe credit card(Lodge card) reconciliation process, timing and deliverables (if applicable).		
2.1.4	ACCOUNT MANAGEMENT	10	
2.1.4.1	Provide the proposed Account Management structure / organogram.	10	
	Describe what quality control procedures/ processes you have in place to ensure that your clients receive consistent quality service.		
	Describe how queries, requests, changes and cancellations will be handled. What is your mitigation and issue resolution process? Please provide a detailed response indicating performance standards with respect to resolving service issues. Complaint handling procedure must be submitted.		
	What is in place to ensure that SA Tourism's travel Policy is enforced.		
	How will you manage the service levels in the SLA and how will you go about doing customer satisfaction surveys?		
	Indicate what workshops/training will be provided to Travelers and /or Travel Bookers.		
2.1.5	COST MANAGEMENT	3	

2.1.5.1	Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results?	3	
	Describe how you will assist SA Tourism to realize cost savings on annual travel spend.		
2.1.6	OFFICE MANAGEMENT	5	
2.1.6.1	Provide an overview of your back-office processes detailing the degree of automation for air tickets workflow, ground arrangements and bill back workflow.	5	
	Describe roles and responsibilities of assigned staff. Please provide the management hierarchy.		
	Describe how you will submit invoices for payment process including matching of supporting documents including, but not limited to, Purchase orders, copy if e-tickets, quotations, 3rd party invoices etc.		
	Describe type of training provided to travel agency personnel		
	Describe the forecasting system employed to staff operations in response to volume changes owing to conferences, project-related volumes, etc.		
	PHASE 2 A TOTAL	40	
2.2	PHASE 2 B RESENTATION AND ONLINE BOOKING SYSTEM DEMOSTRATION	60	
2.2.1	PRESENTATION		
2.2.1.2	RESERVATIONS	25	
2.2.1.2.1	Manage all reservations/ bookings (Corporate).	5	
	Describe how all travel reservations/ bookings are handled e.g. hotel (accommodation); car rental; flights etc.		
	This will include, without limitation, an example of a detailed complex itinerary confirmation that includes air, car, hotel, passport requirement, confirmation numbers and additional proof of competency.		
2.2.1.2.2	Manage group bookings .	13	
	Describe your capabilities for handling group bookings (e.g. for meetings, conferences, events etc.). Also describe your capacity and capabilities of procuring DMC services on behalf of SA Tourism from no less than 3 DMC's (on a competitive price basis) at any given point in time <ul style="list-style-type: none"> Fam Trips & Hosting Project Management of Trade Shows and other similar large-scale events 		
2.2.1.2.3	Directly negotiated rates	3	
	Negotiated airline fares, accommodation establishment rates, car rental rates, etc., that are negotiated directly or established by National Treasury or by SA Tourism are non-commissionable , where commissions are earned for SA Tourism bookings, all these commissions should be returned to SA Tourism on a quarterly basis.		
	Describe how these specific rates will be secured. Describe any automated tools that will be used to assist with maintenance and processing of the said negotiated rates.		
2.2.1.2.4	Manage airline reservations.	2	
	Describe in detail the process of booking the most cost-effective and practical routing for the traveller.		
	This will include, without limitation, the refund process and how you manage the unused non-refundable airline tickets, your ability to secure special airline services for traveller(s) including preferred seating, waitlist clearance, special meals, travellers with disabilities , etc.		
2.2.1.2.5	After-hours and emergency services	2	
	The bidder must have capacity to provide reliable and consistent after hours and emergency support to traveller(s).		

	Please provide details/ Standard Operating Procedure of your after-hour support e.g.		
	<input type="checkbox"/> how it is accessed by Travelers,		
	<input type="checkbox"/> where it is located, centralized/ regionalized, in-country (owned)/ outsourced etc.		
	<input type="checkbox"/> is it available 24/7/365		
	<input type="checkbox"/> Reminders to [Institution name] to process purchase orders within 24 hours to reduce queries on invoices		
2.2.1.3	TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING	10	
2.2.1.3.1	Describe the proposed booking system e.g. Global Distribution System (GDS)	10	
	Describe how travel consultants access and book web airfares i.e. non-GDS inventories (low cost carriers/ consolidators), and hotel web rates.		
	Describe how you will manage data and management information such as traveller profiles, tracking of savings and missed savings, tracking of unused airline tickets, cancellation, traveller behavior, transaction level data, etc.		
	Describe on how you 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 .(The data security should be in the data protecting act)		
	Give actual examples of standard reports that you currently have available. Give an indication if reports can be customized.		
	Provide a description of all technology and reporting products proposed for SA Tourism.		
	Can the TMC comply with SA Tourism's monthly reporting requirement as prescribed by National Treasury? See Monthly Reporting Template prescribed by National Treasury Instruction No 3 of 2016/17.		
Describe the compatibility of your online solution to fully integrate into SA Tourism's ORACLE ERP. Indicate the turnaround time to complete this process and a breakdown of the expected cost that will be associated with it (in case SA Tourism decide to integrate)			
2.2.1.4	QUARTERLY AND ANNUAL TRAVEL REVIEWS	5	
2.2.1.4.1	Provide a sample of a Quarterly and Annual review used for performance management during the life cycle of the contract.	5	
2.2.2	Online booking system demonstration	20	
2.2.2.1	Proposed online booking tool	20	
	TOTAL FOR PHASE 2 (A+B)	100	

- Bids proposals will be evaluated strictly according to the bid evaluation criteria stipulated in this section.
- Bidders must, as part of their bid documents, submit supportive documentation for all functional requirements as indicated in the Terms of Reference. The panel responsible for scoring the respective bids will evaluate and score all bids based on information presented in the bid proposals in line with the RFP.
- The score for functionality will be calculated in terms of the table below where each Bid Evaluation Committee (BEC) member will rate each individual criterion on the bid evaluation score sheet using the following value scale/matrix:

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

Good	Satisfies the requirement with minor additional benefits . Above average demonstration by the supplier of the relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services. Response identifies factors that will offer potential required services, with supporting evidence.	4
Acceptable	Satisfies the requirement. Demonstration by the supplier of the relevant ability, understanding, experience, skills, resource, and quality measures required to provide the goods / services, with supporting evidence.	3
Minor Reservations	Satisfies the requirement with minor reservations . Some minor reservations of the supplier's relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services, with little or no supporting evidence.	2
Serious Reservations	Satisfies the requirement with major reservations . Considerable reservations of the supplier's relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services, with little or no supporting evidence.	1
Unacceptable	Does not meet the requirement . Does not comply and/or insufficient information provided to demonstrate that the supplier has the ability, understanding, experience, skills, resource & quality measures required to provide the goods / services, with little or no supporting evidence.	0

Phase 3: Price and BBBEE Evaluation (80+20) = 100 points

Only Bidders that who meets the minimum of 70% threshold of functionality in Phase 2 will be evaluated in Phase 3 for price and BBBEE level of contribution.

The total points for price evaluation (out of 80/90) and the total points for BBBEE evaluation (out of 20/10) will be consolidated. The bidder who scores the highest points for comparative pricing and B-BBEE status level of contributor after the consolidation of points will normally be considered as the preferred bidder who South African Tourism will enter into further negotiations with for the respective marketing discipline that was tendered for.

In terms of Regulation 6 (2) and 7 (2) of the Preferential Procurement Regulations, preference points must be awarded to a bidder for attaining the B-BBEE status level of contribution in accordance with the table below:

B-BBEE Status Level of Contributor	Number of points (90/10 system)	Number of points (80/20 system)
1	10	20
2	9	18
3	6	14
4	5	12
5	4	8
6	3	6
7	2	4
8	1	2
Non-compliant contributor	0	0

Upon the successful negotiation and signing of a contract and services level agreement with the preferred bidder all other bidders will be considered as unsuccessful.

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