



SOUTH AFRICAN TOURISM

PART C: TENDER EVALUATION PROCESS - TRAVEL MANAGEMENT COMPANY FOR NORTH AMERICA HUB: SAT NUMBER 306/25

Table 1: Summary of the Evaluation Phases:

Phase 1 Administrative and Mandatory and bid requirements	Phase 2 Desktop Functional Technical and Presentation Evaluation	Phase 3 Price Evaluation
Service providers' responses will be evaluated based on compliance with the listed administrative and mandatory bid requirements	Service provider(s) are required to achieve a minimum threshold of 70 points to proceed to Phase 3. The Tender/Evaluation Matrix Cross Reference: Service providers should reference the criteria to the portfolio of evidence in the bid proposal. – It is of vital importance that systematic scoring can be carried out.	The tender will be evaluated on pricing evaluation. The highest-scoring bidder will be appointed on price.

Phase 1: Administrative and Mandatory Bid Requirements

Without limiting, the generality of South African Tourism is other critical requirements for this bid, service provider must submit all the documents required.

All documents must be completed and signed by the duly authorised representative of the prospective service provider(s). During this phase, service providers' responses will be evaluated based on compliance with the listed administrative and mandatory bid requirements.

Table 2: Phase 1 Evaluation (Administration Requirements)

Document submitted that must Be submitted	YES/NO	Description
Invitation SBD 1		Complete and sign where applicable.
Declaration of interest (SBD 4)		If the bidder is found to have missed signing off or duly completed the SBD, SAT may require, within two working days, a sign-off or duly completed of the SBD, and failure will result in the bid being disqualified.
Preference points claim form in terms of the preferential procurement regulations 2022 (SBD 6.1)		
NB: Only applicable to SA bidders		
Registration on the Central Supplier Database (CSD)		- All bidders, including proposed partner/subcontractor agencies, must be registered as a service provider on the National Treasury's Central Supplier Database (CSD). - If the bidder is not registered, register with your company before
NB: Only applicable to SA bidders.		

		submitting your proposal. Visit https://secure.csd.gov.za/ to obtain your vendor number. Submit proof of registration. (Applicable to South African Companies only) • Proof of registration can be in any form that SAT can verify that the bidder is registered on the CSD, e.g., MAAA number, CSD report, etc. • Tax compliance is only considered when awarding the tender (the bidder), not during various evaluation phases. • During the award phase, if a bidder is found to be non-compliant as per the CSD or SARS confirmation, the bidder must provide proof of compliance or written proof by SARS of their tax compliance status within seven working days, of which failure will result in the tender not being awarded to the bidder. SAT reserves the right to consider the next bidder within the process.
B - BBEE Certificate 1. NB: Only applicable to SA bidders.		B - BBEE Certificate or, for companies that have less than R10 million turnover, a sworn affidavit 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 a sworn affidavit will result in non-compliant on the preference points system)

Table 3: Phase 1 Evaluation (Mandatory Requirements)

Document submitted that must Be submitted	YES/NO	Failure to meet the requirements will result in disqualification.
Registration with registered statutory body.		Bidders must be a member of the International Air Transport Association (IATA). Provide proof of a valid IATA membership.

Phase 2: Technical Evaluation Criteria = Weighting out of 100 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.

Bidders will be required to achieve a minimum threshold of 70 points in order to proceed to Phase 3 for Price and Preference point system (Specific goals) evaluation.

Table 4: Phase 2 Evaluation

TO BE COMPLETED BY THE TENDERING COMPANY		
#	Technical Evaluation Criterion	Weight

1	1. Company Experience Experience Relevant to the Scope of Work (Evaluation of the bidder's years of experience in travel management services, especially corporate Travel and sourcing from DMOs.) Bidders are to submit contactable references from previous clients where similar services were conducted successfully. References should be in the form of a formal written letter on a client's letterhead, and the letters should be for work done within the past 3 years This evaluation criteria will be evaluated in line with the functionality evaluation matrix below • Three reference letters which meet the criteria = 1 Point • Four reference letters which meet the criteria = 2 points • Five reference letters which meet the criteria = 3 points NON-SCORING • No Reference/less than 3 references which meet the criteria • Submission of Appointment letters (and not reference letters) • Submission of letter that is not relevant to travel management services • References in a form of email, list or any form other than a formal written letter from clients • References for work older than 3 years. • Reference with no date to determine if it is within the three year period.	20
2	2. RESERVATIONS Manage all reservations/ bookings (Corporate). • Describe how all travel reservations/ bookings are handled, e.g. hotel (accommodation); car rental, flights, etc. and how your company will ensure the greatest cost savings for South African Tourism. • An example of a detailed complex itinerary confirmation that includes flights , car, hotel, passport/visa requirements, confirmation numbers, after-hours services, emergency services, cancellations, refunds, Airport Protocol/Fast track Service, security Escort, and other additional proof of competency. • Please provide an explanation of the refund process of air tickets and how unused non-refundable airline tickets are managed, your ability to secure special airline services for travellers, including preferred seating, waitlist clearance, special meals, travellers with disabilities, hotel cancellations, etc. This evaluation criteria will be evaluated in line with the functionality evaluation matrix below • Excellent = 3: Bidder submits and meets all 3 requirements, with clear details on each requirement • Acceptable=2: Bidder submits and meets 2 requirements, with clear details outlining each requirement • Average = 1: Bidder submits and meets 1 requirement only, with clear details outlining the requirement • Unacceptable =0: The bidder does not meet any of the requirements specified above or has submitted something irrelevant	40

3	3. FINANCIAL MANAGEMENT - Describe how you will implement the negotiated rates and maximum allowable rates established by South African Tourism and 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. - 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 South African Tourism and how the credit card reconciliation process, timing, and deliverables will be managed. This evaluation criteria will be evaluated in line with the functionality evaluation matrix below - Excellent = 3: Bidder submits and meets all 3 requirements, with clear details on each requirement - Acceptable=2: Bidder submits and meets 2 requirements, with clear details outlining each requirement - Average = 1: Bidder submits and meets 1 requirement only, with clear details outlining the requirement - Unacceptable =0: The bidder does not meet any of the requirements specified above or has submitted something irrelevant	10
4	4. TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING - Describe the proposed booking system e.g. Global Distribution System (GDS) - Describe how travel consultants access and book web fares i.e. non-GDS inventories (low cost carriers/ aggregators), 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 behaviour, transaction level data, etc. - Provide actual examples of standard reports that you currently have available. Also provide an indication if reports can be customised. Provide a description of all technology and reporting products proposed for South African Tourism. This evaluation criteria will be evaluated in line with the functionality evaluation matrix below - Excellent = 3: Bidder submits and meets all 4 requirements, with clear details on each requirement - Acceptable=2: Bidder submits and meets 3 requirements, with clear details outlining each requirement - Average = 1: Bidder submits and meets 2 requirement only, with clear details outlining the requirement - Unacceptable =0: The bidder meets 1 or 0 of the requirements specified above or has submitted something irrelevant	10
5	5. ACCOUNT MANAGEMENT - Provide the proposed Account Management structure/organogram. - Describe what quality control procedures/ processes you have in place to ensure that your clients experience 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 South African 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? - Describe the forecasting system employed to staff operations in response to volume changes owing to conferences, project-related volumes, etc. This evaluation criteria will be evaluated in line with the functionality evaluation matrix below - Excellent = 3: Bidder submits and meets all 6 requirements, with clear details on each requirement	20

	- Acceptable=2: Bidder submits and meets 4-5 requirements, with clear details outlining each requirement - Average = 1: Bidder submits and meets 1-3 requirement only, with clear details outlining the requirement - Unacceptable =0: The bidder does not meet any of the requirements specified above or has submitted something irrelevant	
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Table 5: Functional Evaluation Matrix

Bidders must meet the minimum threshold of **70 points** to proceed to Phase 3: Price and Preference (specific goals) evaluation.

- Bid proposals will be evaluated strictly according to the bid evaluation criteria stipulated in this section.
- Bidders must submit supportive documentation for all functional requirements as part of their bid documents 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 criterion on the bid evaluation score sheet using the following value scale/matrix.

Phase 3: Price Evaluation = 100 Points

Only Bidders who meet the minimum 70% threshold of functionality in Phase 2 will be evaluated in Phase 3 for price evaluation. Failure to meet the minimum thresholds of both evaluation phases will result in disqualification regardless of combined scored points.

The bidder who advances to Phase three (3) will be evaluated based on Price comparison and SA Tourism will appoint the bidder who scores the highest point.

Objective Criteria:

- Should the recommended bidder and SA Tourism not reach an agreement on the SLA, regarding service performance, penalty may be implemented as a mitigating factor to address the non-performance issues, SAT reserves the right to move to the next acceptable bidder to be included to the panel.
- In cases where SA Tourism had/has current/historic non-performances with a provider, SAT reserves the right to not appoint the specific provider, subject to demonstrable documentary evidence that supports the non-performance or the remedial action of the non-performance unless evidence of resolution of the non-performance is provided.

Table 5

1. LIST OF RETURNABLES			
BIDDERS SHOULD PLEASE ADHERE THE FOLLOWING INSTRUCTIONS			
a) TICK APPLICABLE BOX			
b) ENSURE THAT THE FOLLOWING DOCUMENTS ARE COMPLETED, SUBMITTED AND SIGNED WHERE APPLICABLE			
ANNEXURES	DOCUMENT DECRPTION	YES	NO
PART A & B	IS BID INVITATION FORM, TERMS, AND CONDITIONS FOR BIDDING COMPLETED, SIGNED, AND SUBMITTED?		
SUPPLIER IS REQUIRED TO USE THE PRESCRIBED SEQUENCE IN ATTACHING THE ANNEXURES THAT COMPLETE THE BID OR RFQ DOCUMENT			

ANNEXURE A	IS THE STANDARD BID DOCUMENT (SBD4) FORM BIDDER'S DISCLOSURE COMPLETED, SIGNED AND SUBMITTED?		
ANNEXURE B	IS THE BIDDER'S QUOTED PRICE OR FINANCIAL OFFER SUBMITTED AND ALIGNED WITH THE SCOPE OF WORK? OR STATED IN THE BELOW TABLE OF DESCRIPTION OF SERVICE/GOODS?		

2. APPLICATION OF PREFERENCE POINT SYSTEM

2.1 DEFINITIONS

HISTORICALLY DISADVANTAGED INDIVIDUALS (HDI) IS DEFINED AS A SOUTH AFRICAN CITIZEN -

- a) WHO, DUE TO THE APARTHEID POLICY THAT WAS IN PLACE, HAD NO VOTING RIGHTS IN THE NATIONAL ELECTIONS PRIOR TO THE INTRODUCTION OF THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1983 (ACT NO. 100 OF 1983) OR THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1993 (ACT NO. 200 OF 1993) ("THE INTERIM CONSTITUTION) AND OR
- b) WHO IS A WOMAN AND/OR
- c) YOUTH

2.2 WITH THE UNDERSTANDING THAT ANY PERSON WHO RECEIVED SOUTH AFRICAN CITIZENSHIP ON OR BEFORE THE INTRODUCTION OF THE INTERIM CONSTITUTION, WILL NOT BE DEEMED TO BE HDI.

2.3 ANY REFERENCE TO WORDS "BID" OR "BIDDER" HEREIN AND/OR IN ANY OTHER DOCUMENTATION SHALL BE CONSTRUED TO HAVE THE SAME MEANING AS THE WORDS "TENDER" OR "TENDERER".

2.4 "A WOMAN" REFERS TO A FEMALE PERSON WHO IS A SOUTH AFRICAN CITIZEN

2.5 "HDI EQUITY OWNERSHIP" REFERS TO THE PERCENTAGE OF A PARTNERSHIP OR BUSINESS THAT IS OWNED BY INDIVIDUALS, OR IN THE CASE OF A COMPANY, THE PERCENTAGE OF SHARES WHICH IS OWNED BY INDIVIDUALS WHO ARE ACTIVELY INVOLVED IN THE MANAGEMENT DECISIONS AND DAY TO DAY OPERATIONAL ACTIVITIES OF THE COMPANY OR BUSINESS AND WHO EXERCISES CONTROL IN THE BUSINESS IN RELATION TO THEIR OWNERSHIP AT THE

CLOSE OF TENDER. WHERE INDIVIDUALS ARE NOT ACTIVELY INVOLVED IN THE MANAGEMENT AND DAY TO DAY OPERATIONAL ACTIVITIES OF THE BUSINESS AND WHO DOES NOT EXERCISE CONTROL IN RELATION TO THE PERCENTAGE OF THEIR OWNERSHIP, EQUITY OWNERSHIP POINTS CANNOT BE AWARDED.

2.6 "BLACK PEOPLE" IS A GENERIC TERM WHICH MEANS AFRICANS, COLOURED AND INDIANS WHO ARE CITIZENS OF THE RSA BY BIRTH OR DESCENT OR BY NATURALISATION BEFORE 27 APRIL 1994 OR AFTER.

2.7 "SMALL ENTERPRISE" MEANS A SEPARATE AND DISTINCT BUSINESS ENTITY, TOGETHER WITH ITS BRANCHES OR SUBSIDIARIES, IF ANY, INCLUDING COOPERATIVE ENTERPRISES, MANAGED BY ONE OWNER OR MORE PREDOMINANTLY CARRIED ON IN ANY SECTOR OR SUBSECTOR OF THE ECONOMY.

2.8 "YOUTH" IS A GENERIC TERM WHICH MEANS PERSONS BETWEEN 14 TO 35 YEARS OF AGE. (THE MAXIMUM AGE OF PERSON/DIRECTOR/SHAREHOLDER ETC MUST BE BELOW OR 35 YEARS ON OR BEFORE THE CLOSING DATE AND TIME OF THE RFQ)

2.9 "EXEMPTED MICRO ENTERPRISE (EME)" IN TERMS OF THE GENERIC CODES OF GOOD PRACTICE, IT REFERS TO AN ENTERPRISE WITH AN ANNUAL TOTAL REVENUE OF R 10 MILLION OR LESS.

2.10 "QUALIFYING SMALL ENTERPRISE (QSE)" IN TERMS OF THE GENERIC CODES OF GOOD PRACTICE, IT REFERS TO AN ENTERPRISE WITH AN ANNUAL TOTAL REVENUE OF BETWEEN R 10 MILLION AND R 50 MILLION

2.11 "SPECIFIC GOALS" REFERS TO CONTRACTING WITH PERSONS, OR CATEGORIES OF PERSONS, HISTORICALLY DISADVANTAGED BY UNFAIR DISCRIMINATION ON THE BASIS OF RACE, GENDER OR DISABILITY AND IMPLEMENTING PROGRAMME AS PUBLISHED IN THE GOVERNMENT GAZETTE NO. 16085 DATED 23 NOVEMBER 1994.

3. CRITERIA FOR BREAKING DEADLOCK IN SCORING

- a) IF TWO OR MORE OF THE TENDERERS HAVE SCORED EQUAL TOTAL NUMBER OF POINTS, THE CONTRACT WILL BE AWARDED TO THE TENDERER THAT SCORED THE HIGHEST POINTS FOR SPECIFIC GOALS;
- b) IF TWO OR MORE TENDERS SCORE EQUAL TOTAL NUMBER OF POINTS IN ALL RESPECTS, THE AWARD WILL BE DECIDED BY THE DRAWING OF LOTS

4. DELIVERIES

- a. ALL DELIVERIES MAY BE ACCOMPANIED BY A DELIVERY NOTE OR AN INVOICE OF AN OFFICIAL PURCHASE ORDER NUMBER AGAINST WHICH THE DELIVERY HAS BEEN AFFECTED
- b. DELIVERIES NOT COMPLYING WITH THE PURCHASE ORDER FORM MAY BE RETURNED TO THE SUPPLIER(S) AT THE SUPPLIER'S EXPENSE. SAT WILL NOT BE LIABLE FOR PAYMENT OF INCORRECTLY DELIVERED GOODS OR SERVICE
- c. BIDDERS SHOULD INDICATE THE PLANNED DELIVERY PERIOD (IN DAYS) FROM THE DATE AN ORDER IS ISSUED

5. POPIA DISCLAIMER**5.1. COMPLIANCE WITH THE PERSONAL INFORMATION ACT, 4 OF 2013**

PERSONAL INFORMATION SHARED WITH THE SAT SHALL BE TREATED WITH CONFIDENTIALITY AND IN COMPLIANCE WITH THE PROTECTION OF PERSONAL INFORMATION ACT, 4 OF 2013 (POPIA) AND OTHER APPLICABLE LAWS. FOR PURPOSES OF THIS DISCLAIMER, "PERSONAL INFORMATION" SHALL BE DEFINED AS DETAILED IN THE PROMOTION OF ACCESS TO INFORMATION ACT, ACT 2 OF 2000 (PAIA) AND POPIA, AND "PROCESSING" AND "FURTHER PROCESSING" SHALL BE READ, INTERPRETED AND UNDERSTOOD AS DETAILED AND DEFINED IN POPIA.

5.2. CONSENT TO PROCESSING AND FURTHER PROCESSING OF PERSONAL INFORMATION

THE SATMAY PROCESS AND FURTHER PROCESS RECEIVED PERSONAL INFORMATION, INTERNALLY OR EXTERNALLY, IN THE EXECUTION OF ITS MANDATE AND/OR AS REQUIRED BY LAW. THE SATMAY SHARE PERSONAL INFORMATION WITH ITS SERVICE PROVIDERS, AGENTS, CONTRACTORS, LEGAL AND OTHER PROFESSIONAL ADVISORS AUTHORISED TO PROCESS THIS INFORMATION. THE SATMAY THUS PLACE RECEIVED PERSONAL INFORMATION IN THE PUBLIC DOMAIN DUE TO THE NATURE AND REQUIREMENTS OF ITS WORK.

5.3. FURTHER PROCESSING OF PERSONAL INFORMATION

YOU FURTHER GRANT THE SATEXPRESS AND/OR IMPLIED PERMISSION TO FURTHER PROCESS RECEIVED PERSONAL INFORMATION AND PLACE IT IN THE PUBLIC DOMAIN, IN THE EXECUTION OF ITS MANDATE AND STATUTORY OBLIGATIONS.

5.4. DUTY OF CARE

THE SAT VALUES YOUR PRIVACY AND SHALL TAKE ALL REASONABLE MEASURES TO PROTECT RECEIVED PERSONAL INFORMATION.

5.5. EXEMPTION FROM LIABILITY

THE SAT (INCLUDING ITS OFFICIALS AND/OR EMPLOYEES) ACCEPTS NO LIABILITY WHATSOEVER, FOR ANY LOSS, DAMAGE (WHETHER DIRECT, INDIRECT, SPECIAL, OR CONSEQUENTIAL), AND/OR EXPENSES OF ANY NATURE WHATSOEVER WHICH MAY ARISE AS A RESULT OF, OR WHICH MAY BE ATTRIBUTABLE DIRECTLY OR INDIRECTLY, FROM INFORMATION MADE AVAILABLE HEREIN, OR ACTIONS OR TRANSACTIONS RESULTING THEREFROM

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