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**BID NUMBER: TENDER-INS/2025/26/005**

**BID DESCRIPTION – APPOINTMENT OF TRAVEL MANAGEMENT COMPANY (TMC) TO PROVIDE PROPOSALS FOR THE PROVISION OF TRAVEL MANAGEMENT SERVICES FOR A PERIOD OF THREE (3) YEARS.**

Tender documents are obtainable from **3<sup>rd</sup> November 2025** from the following websites:

- **ETender Portal**
- **INSETA Website**

**Closing Date: 26<sup>th</sup> November 2025 at 11:00 am**

**Delivery: INSETA Office, 18 Fricker Road, Illovo, Sandton.**

For enquiries contact the INSETA Supply Chain Management at [bids@inseta.org.za](mailto:bids@inseta.org.za)

## TERMS OF REFERENCE

### APPOINTMENT OF TRAVEL MANAGEMENT COMPANY (TMC) TO PROVIDE PROPOSALS FOR THE PROVISION OF TRAVEL MANAGEMENT SERVICES FOR A PERIOD OF THREE (3) YEARS.

#### 1. BACKGROUND

- 1.1 The Insurance Sector Education and Training Authority (INSETA) is a public entity listed in schedule 3A of the PFMA and was established in March 2000. The INSETA must, comply with the Skills Development Act (SDA), the Skills Development Levies Act (SDLA), the Public Finance Management Act (PFMA), any other relevant legislation and the Constitution.
- 1.2 The objective of this request is to appoint a professional and accredited service provider to provide a Travel Management Service to INSETA (as and when required) for a period of three (3) years.

#### 2 CURRENT SITUATION

- 2.1 Insurance Sector Education and Training Authority (INSETA) currently uses a Travel Management Company (TMC) whose contract will end on 31<sup>st</sup> March 2026 to manage the travel requisition and travel expense processes within the travel management lifecycle. The travel requisition process is currently a semi-automated process. The traveller request quotations from the TMC, the travel requisition is manually captured on forms that go through a manual authorisation approval procedure and are then forwarded to the INSETA travel coordinator. The INSETA travel coordinator issues purchase order to the Travel Agent which goes through an approval workflow process and then through to the travel management company for travel booking.
- 2.2 INSETA's primary objective in issuing this RFP is to enter into agreement with a successful bidder(s) who will achieve the following:
- 2.2.1 Provide INSETA with the travel management services that are consistent and reliable and will maintain a high level of traveller satisfaction in line with the service levels.
- 2.2.2 Achieve significant cost savings for INSETA without any degradation in the services.
- 2.2.3 Appropriately contain INSETA's risk and traveller risk.
- 2.3 The current **INSETA** total volumes per annum include air travel, accommodation, car hire, forex, conference, etc. The table below outlines the number of transactions for the **2024/2025** Financial Year as follows:

Service Category	Estimated No of Turns per Annum
Conferencing	74
Domestic Air Travel	428
Accommodation Domestic	459

Car Hire	288
International Air Travel	20
Corporate Management Fee	2907
Transfers	305
Accommodation International	16
Damages/ Accident Repairs	13
Transfers International	0
Client Entertainment/Gifts	0
Parking	9
Insurance	16
Spenders Vouchers	0
Visas and Passports	1
After Hours Emergency Fee	75
Traffic Fine Admin Fees	1411

**Note:** *These figures are projections based on the current trends, and they may change during the tenure of the contract. These are meant for illustration purposes to assist the bidders to prepare their proposal.*

### 3 SCOPE OF WORK

3.1 The successful bidder will be required to provide travel management and related services. Deliverables include the provision of the following:

- a) The travel services will be provided to all Travelers travelling on behalf of **INSETA**, locally and or internationally. This will include employees and contractors, consultants, and clients (*not limited*) where the agreement is that **INSETA** is responsible for the arrangement and cost of travel.
- b) Provide travel management services during normal office hours (Monday to Friday 8h30 – 17h00) and provide after hours and emergency services as stipulated in paragraph above.
- c) Familiarisation with current **INSETA** travel business processes.
- d) Familiarisation with current travel suppliers and negotiated agreements that are in place between **INSETA** and third parties. Assist with further negotiations for better deals with travel service providers.
- e) Familiarisation with the current INSETA 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.

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- g) Provide a facility (web based on-line booking tool) for **INSETA** to update their travelers' profiles and implement bookings as well as required approvals.
- 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.

## 3.2 Reservations

- 3.2.1 Receive travel requests from travelers and/or 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 traveler via the agreed communication medium always endeavor to make the most cost-effective travel arrangements based on the request from the traveler and/or travel Booker.
- 3.2.2 Apprise themselves of all travel requirements for destinations to which travelers will be travelling to and advise the Traveler of alternative plans that are more cost effective and more convenient where necessary.
- 3.2.3 Obtain a minimum of three (3) price comparisons for all travel requests where the routing or destination permits. *(Where applicable, reasons and approval must be sought, for less than 3 quotations).*
- 3.2.4 Book the negotiated discounted fares and rates where possible, 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 flights schedules prior to or during the traveler's official trip.
- 3.2.5 When necessary, e-tickets and billing shall be modified and re-issued to reflect these changes.
- 3.2.6 Book parking facilities at the airports where required for the duration of the travel.
- 3.2.7 Respond timely and process all queries, requests, changes, and cancellations timeously and accurately.
- 3.2.8 Must be able to facilitate group bookings (e.g., for meetings, conferences, events, etc.)
  - a) Must issue all necessary travel documents, itineraries, and vouchers timeously to traveller(s) prior to departure dates and times.
  - b) Advise the Traveller of all visa and inoculation requirements well in advance.
  - c) Assist with the arrangement of foreign currency and the issuing of travel insurance for international trips where required.
  - d) Facilitate any reservations that are not bookable on the Global Distribution System (GDS).
- 3.2.9 Facilitate the bookings that are generated through their own or third party Online Booking Tool (OBT) where it can be implemented.
- 3.2.10 Note that, unless otherwise stated, all cases include domestic, regional and international travel bookings.
- 3.2.11 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.
- 3.2.12 Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that are negotiated directly or by **INSETA** are non-commissionable, where commissions are earned for **INSETA** bookings all these commissions should be returned to **INSETA** on a quarterly

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basis.

- 3.2.13 Ensure confidentiality in respect of all travel arrangements and concerning all persons requested by **INSETA**.
- 3.2.14 Timeous submission of proof that services have been satisfactorily delivered (invoices) as per **INSETA's** instructions.

### 3.3 Air Travel

- 3.3.1 The TMC must be able to book full-service carriers as well as low-cost carriers.
- 3.3.2 The TMC will book the most cost-effective airfares possible for domestic travel, for international flights, the airline which provides the most cost-effective and practical routings may be used.
- 3.3.3 The TMC should obtain three or more price comparisons where applicable to present the most cost effective and practical routing to the Traveller.
- 3.3.4 The airline ticket should include the applicable airline agreement number as well as the individual loyalty program number of the Traveller (if applicable).
- 3.3.5 Airline tickets must be delivered electronically (SMS and/or email format/or any other application or platform) to the traveller(s) and travel bookers promptly after booking before the departure times.
- 3.3.6 The TMC will also assist with the booking of charters for VIPs (Very Important People/Persons) utilising the existing transversal term contract where applicable as well as the sourcing of alternative service providers for other charter requirements.
- 3.3.7 The TMC will be responsible for the tracking and management of unused e-tickets as per agreement with the institution and provide a report on refund management once a quarter.
- 3.3.8 The TMC must during their report period provide proof that bookings were made against the discounted rates on the published fairs where applicable.
- 3.3.9 Ensure that travelers are always informed of any travel news regarding airlines (like baggage policies, checking in arrangements, etc.)
- 3.3.10 Assist with lounge access if and when required.
- 3.3.11 Negotiated corporate rates. Should there be no rate agreement in place in the destination, or should the contracted establishment be unable to accommodate the traveler, the TMC will source suitable accommodation bearing in mind the requirement of convenience for the traveler and conformation with acceptable costs.
- 3.3.12 Accommodation vouchers must be issued to all **INSETA** travelers for accommodation bookings and must be invoiced to **INSETA** as per arrangement. Such invoices must be supported by a copy of the original hotel accommodation charges.
- 3.3.13 The TMC must during their report period provide proof, where applicable, that accommodation rates were booked within the maximum allowable rates as communicated by **INSETA**.
- 3.3.14 Cancellation of accommodation bookings must be done promptly to guard against no show and late cancellation fees.

### 3.4 Accommodation

- 3.4.1 The TMC will obtain three price comparisons from accommodation establishments that provide the best available rate within the maximum allowable rate matrix (as communicated by **INSETA**) that is located as close as possible to the venue or office

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or location or destination of the traveller. (*Where applicable or seek approval where less than 3 quotations are obtained*).

- 3.4.2 This includes planning, booking, confirming corporate rates, and amending accommodation with any establishment (hotel group, private hotel, guest house or Bed & Breakfast) in accordance with **INSETA's** travel policy.
- 3.4.3 Should there be no rate agreement in place in the destination, or should the contracted establishment be unable to accommodate the traveler, the TMC will source suitable accommodation bearing in mind the requirement of convenience for the traveler and Conformation with acceptable costs, or as stipulated in written directives issued from **INSETA**.
- 3.4.4 Travelers may only stay at accommodation establishments with which **INSETA** has been negotiated by TMC which must obtain price comparisons within the maximum allowable rate matrix as per the INSETA cost containment efforts.
- 3.4.5 Accommodation vouchers must be issued to all **INSETA** travelers for accommodation bookings and must be invoiced to **INSETA** as per arrangement. Such invoices must be supported by a copy of the original hotel accommodation charges.
- 3.4.6 The TMC must during their report period provide proof, where applicable, that accommodation rates were booked within the maximum allowable rates as per the INSETA cost containment efforts.
- 3.4.7 The cancellation of accommodation bookings must be made promptly to guard against no show and late cancellation fees.

### 3.5 Car Rental

- 3.5.1 The TMC will book the approved category vehicle in accordance with the INSETA Travel Policy with the appointed car rental service provider from the closest rental location (airport, hotel and venue). (Any penalties in the form of the travel fines must sent to the individual must be billed to the driver of the vehicle).
- 3.5.2 The travel consultant should advise the Traveller on the best time and location for collection and return considering the Traveller's specific requirements.
- 3.5.3 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.
- 3.5.4 **For international travel the TMC may offer alternative ground transportation to the Traveller that may include rail, buses, and transfers.**
- 3.5.5 The TMC will book transfers in line with the INSETA Travel Policy with the appointed and/or alternative service providers. Transfers can also include bus and coach services etc.
- 3.5.6 The TMC should manage rental companies on behalf of the INSETA and ensure compliance with minimum standards.
- 3.5.7 The TMC must during their report period provide proof that negotiated rates were booked, where applicable.

### 3.6 After Hours and Emergency Services

- 3.6.1 The TMC must provide a consultant or team of consultants to assist Travellers with after hours and emergency reservations and changes to travel plans.

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- 3.6.2 A dedicated consultant/s must be available to assist VIP/Executive Travellers with after hour or emergency assistance.
  - 3.6.3 After hours' services must be provided from Monday to Friday outside the official hours (17h00 to 8h30) and twenty-four (24) hours on weekends and Public Holidays.
  - 3.6.4 A call centre facility or after hours contact number (SMS and/or email format/or any other applications or platform) should be available to all travellers so that when required, unexpected changes to travel plans can be made and emergency bookings attended to.
  - 3.6.5 The Travel Management Company must have a standard operating procedure for managing after hours and emergency services. This must include the submission for a request for a purchase order generation of the request within 24 hours.
- 3.7 Communication
- 3.7.1 The TMC may be requested to conduct workshops and training sessions for Travel Bookers of **INSETA** with +/- 150 employees. *(Must be included in the total cost for the duration of the contract – as and when required).*
  - 3.7.2 All enquiries must be investigated, and prompt feedback be provided in accordance with the Service Level Agreement.
  - 3.7.3 The TMC must ensure sound communication with all stakeholders. Link the business traveller, travel coordinator, travel management company in one smooth continuous workflow.
- 3.8 Financial Management
- 3.8.1 The TMC must implement the rates negotiated by **INSETA** with travel service providers or the discounted air fares, or the maximum allowable rates established by INSETA.
  - 3.8.2 The TMC will be responsible to manage the service provider accounts. This will include the timely receipt of invoices to be presented to **INSETA** for payment within the agreed time period.
  - 3.8.3 Enable savings on total annual travel expenditure and this must be reported, and proof provided during monthly and quarterly reviews.
  - 3.8.4 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 INSETA for the services rendered.
  - 3.8.5 Consolidate Travel Supplier bill-back invoices.
  - 3.8.6 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.
  - 3.8.7 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.
  - 3.8.8 The TMC is responsible for the consolidation of invoices and supporting documentation to be provided to INSETA'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.
  - 3.8.9 Ensure Travel Supplier accounts are settled timeously.

### 3.9 Technology, Management Information and Reporting

- 3.9.1 The TMC must have the capability to consolidate all management information related to travel expenses into a single source document with automated reporting tools.
- 3.9.2 The implementation of an Online Booking Tool to facilitate domestic bookings should be considered to optimise the services and related fees.
- 3.9.3 All management information and data input must be accurate.

### 3.10 Value Added Services

3.10.1 The TMC must provide the following value-added services (Destination information for regional and international destinations):

- a) Health warnings.
- b) Weather forecasts.
- c) Places of interest.
- d) Visa information.
- e) Travel alerts.
- f) Location of hotels and restaurants.
- g) Foreign exchange
- h) International Roaming Charges
- i) Information including the cost of public transport.
- j) Rules and procedures of the airports.
- k) Business etiquette specific to the country.
- l) Airline baggage policy; and
- m) Supplier updates
- n) Insurance cover (international trips)
- o) Electronic voucher retrieval via web and smart phones.
- p) SMS notifications for travel confirmations.
- q) Travel audits.
- r) Global Travel Risk Management.
- s) VIP services for Executives including but not limited to check-in support.

### 3.11 Cost Management

- 3.11.1 The **INSETA's** Travel Policy is establishing a basis for a cost savings culture.
- 3.11.2 It is the obligation of the TMC Consultant to always advise on the most cost-effective option, and costs should be aligned with the INSETA Travel Policy.
- 3.11.3 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.
- 3.11.4 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 **INSETA'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.

### 3.12 Quarterly and Annual Travel Reviews

- 3.12.1 Quarterly reviews are required to be presented by the Travel Management Company on all **INSETA** travel activity in the previous three-month period. These reviews are comprehensive and presented to **INSETA's** delegated officials.
- 3.12.2 Annual Reviews are also required to be presented to **INSETA's** Executive Management.
- 3.12.3 INSETA will provide the reporting requirements to be used as minimum.

### 3.13 Office Management

- 3.13.1 The TMC to ensure high quality service to be always delivered to the **INSETA's** travelers.
- 3.13.2 The TMC is required to provide **INSETA** with highly skilled and qualified human resources of the following roles but not limited to:
  - a) Senior Consultants – To handle all INSETA executive and board travel
  - b) Intermediate Consultants – to handle all INSETA staff and other travelers
  - c) Travel Manager (Operational)
  - d) Finance Manager / Branch Accountant
  - e) Admin Back Office (Creditors / Debtors/ Finance Processors)
  - f) Strategic Account Manager/ relationship manager.
  - g) System Administrator (General Admin)

## 4 TIMEFRAMES

- 4.1 The contract duration will be for a period of three (3) years.

## 5 CONTRACTUAL OBLIGATION

- 5.1 Bidders to fully complete SBD 3.1 including all applicable costs including VAT, with a fixed rate price for the duration of the contract.
- 5.2 In the case of the service provider using sub-contractors, the former will be responsible for ensuring delivery of services from any such sub-contractors and for making any payments to such sub-contractors.
- 5.3 The successful bidder will be required to have adequate professional indemnity as well as liability insurance in place (upon parties contracting).
- 5.4 Bidders are required to fully comply with the relevant SCM Legislative Framework as well as application of regulatory and prescripts. Bidders are also required to take all reasonable steps to protect information, in line with the provisions of the POPIA 4 of 2014.
- 5.5 The successful bidder will be required to sign a non-disclosure agreement for the duration of the contract period.
- 5.6 **Bidder will be subjected to periodic review in terms of measuring satisfactory performance until contract is completed and shall invoke applicable penalties as per contract terms and conditions, where there is unsatisfactory performance.**

## 6 UNSATISFACTORY PERFORMANCE

- 6.1 In the event that the Service Provider fails to meet the performance standards outlined in this ToR or SLA, INSETA shall where applicable raise remedies, terminate the contract, seek damages or raise penalties such as impose financial penalties to the Service Provider.
- 6.2 The following shall be considered examples of unsatisfactory performance:
  - 6.2.1 Failure to meet the agreed-upon deadlines.
  - 6.2.2 Failure to deliver goods or services that meet the agreed-upon standards.
  - 6.2.3 Failure to respond to client inquiries or issues in a timely manner.
  - 6.2.4 Failure to maintain confidentiality or security of client information.
  - 6.2.5 Gross negligence by the service provider or its employees.

## **7 ABSENCE OF OBLIGATION & CONFIDENTIALITY**

- 7.1 No legal or other obligation shall arise between the service provider and INSETA unless/until both parties have signed a formal contract or Service Level Agreement in place.
- 7.2 The Contract site is at INSETA (as and when required).

## **8 WORKMEN AND SUPERVISION ON SITE**

- 8.1 The Service Provider shall be held responsible for the conduct of his employees and the conduct of his sub-contractor's employees for the full duration of the contract.

## **9 EVALUATION CRITERIA**

- 9.1 Responses will be evaluated using a predetermined set of evaluation criteria. The evaluation criteria are designed to reflect the INSETA's requirements in terms of identifying a suitable service provider and ensure the selection process is transparent and affords all the bidders a fair opportunity for evaluation and selection.
- 9.2 **The evaluation criteria will be based on the following phases/requirements:**
  - Phase 0: Administrative requirements
  - Phase 1: Mandatory requirement
  - Phase 2A: Technical Functionality (100 points) – The threshold of 70 points
  - Phase 2B: Booking System Demonstrations
  - Phase 3: Evaluation on Price and Specific Goals

## **10 ADMINISTRATIVE REQUIREMENTS (Phase 0)**

- 10.1 Bidder must submit proof of registration on CSD (**Central Supplier Database**).
- 10.2 Bidder must complete, sign and submit a Standard Bidding Document (SBD 1) Procurement Invitation.
- 10.3 Standard Bidding Document (SBD 3.1) Pricing Schedule – Annexure A (in a separate envelope).
- 10.4 Standard Bidding Document (SBD 4) Bidder's Disclosure.
- 10.5 Standard Bidding Document (SBD 6.1) Preference Points Claim form.

## **11 MANDATORY CRITERIA (Phase 1)**

- 11.1 The Bidder **Must** provide valid proof of the following Memberships Certificates:

Number	Mandatory
1	The bidder must provide a <b>valid proof of a membership certificate of ASATA</b> (Association of South African Travel Agents) – <i>validity applies as at closure of the bid.</i>
2	The bidder must provide a <b>valid proof of membership certificate or license</b> of International Air Association ( <b>IATA</b> ). – <i>validity applies as at closure of the bid.</i>
3	The bidder must provide proof of having Offices or Satellite office or a Branch or in Gauteng. Bidder to provide a copy of their proof of address i.e. municipality account in the TMC's name or valid lease agreement

**Note: All bidders who do not comply with the criteria above will be disqualified from further evaluation.**

## 12 FUNCTIONAL EVALUATION CRITERIA (Phase 2A)

- 12.1 The tender submission will be functionally evaluated out of a **minimum of 100 points for the paper-based evaluation**– **any bidder who scores less than minimum 70 points** will not be considered for further evaluation (**demonstration - Phase 2B**) **which will be scored out 20 points.**
- 12.2 The total maximum score for the paper-based evaluation and the demonstration is 100 points.
- 12.3 The bidder who then scores accordingly will be evaluated in terms of Price and Specific Points on Phase 3.

DESCRIPTION	WEIGHT
<p><b>Bidders Experience:</b> Bidder's proven competency in rendering the required services, including on-line booking tool.</p> <p>Bidder must provide a minimum of five (5) signed, dated and contactable reference letters from <b>Government/ State owned public Entities</b> proving same work done for rendering travel management services including an on-line booking tool. Reference letters must be on client's letterhead, accompanied by an award/appointment letter or a purchase order that align with the reference letter. The reference letters must be for travel management services work conducted within the last five (5) years.</p> <p><b>Note: Reference must be from different clients not all from the same client. Should the submitted reference letters emanate from the same client, the submission will be scored as one submission.</b></p> <ul style="list-style-type: none"> <li>• five (5) and more reference letters with award/appointment letters or purchase orders = <b>50 points</b></li> <li>• Three (3) to four (4) reference letters with award/appointment letters or purchase orders = <b>30 points</b></li> <li>• Two (2) reference letter with award/appointment letter or a purchase order = <b>10 points</b></li> <li>• Non-compliance with the requirements = <b>0 points</b></li> </ul> <p><b>NB: Due diligence will be conducted against reference letters submitted and work performed for the referees (See section 17.1.1)</b></p>	50

<p><b>Methodology and transition/project implementation plan:</b> The bidder to demonstrate a detailed approach, methodology and transition plan aligned to timeframes (Project plan) to be adopted in the contract.</p>	<b>10</b>
<p>Bidder must provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider and INSETA to ensure a smooth transition.</p> <ul style="list-style-type: none"> <li>- Description of your reservations processes, group bookings, afterhours and emergency services in detail, including applicable turnaround times.</li> <li>- Description on the cancellation of car hire, accommodation and flight bookings to guard against no show and late cancellation fees.</li> <li>- Description of your communication process where the traveller, travel co-ordinator/booker and travel management company will be linked in one smooth continuous workflow and how you will ensure that travel bookers are informed of the travel booking processes, including applicable turnaround times.</li> <li>- An overview of your back-office processes, describe roles and responsibilities of assigned staff and provide the staff structure for this account, including applicable turnaround times.</li> </ul> <ul style="list-style-type: none"> <li>• Methodology covering all the above = <b>10 points</b></li> <li>• Non-compliance or partial compliance with the above</li> </ul>	
<p><b>Invoicing and account administration</b></p>	<b>15</b>
<ul style="list-style-type: none"> <li>- Bidder must describe how the 30-day bill-back account administration will be managed, timing and deliverables.</li> <li>- Bidder must describe how pre-payments will be handled where it is required for smaller Bed &amp; Breakfast /Guest House facilities.</li> <li>- Bidder must 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 INSETA.</li> <li>- Please describe credit card reconciliation process, timing, and deliverables.</li> </ul> <ul style="list-style-type: none"> <li>• Proposal aligned to all the above = <b>15 points</b></li> <li>• Non-compliance or partial compliance with the above</li> </ul>	
<p><b>Technology, Management Information and Reporting</b></p>	<b>15</b>
<p>Bidder must provide methodology with the following details:</p> <ul style="list-style-type: none"> <li>• The proposed booking system which includes access, user rights, approval workflows (integration with the INSETA) approval levels, allowance for accounting and reporting as and when required.</li> <li>• Bidder must describe how INSETA travel consultant/ users' access and book web airfares, and hotel web rates.</li> <li>• Bidder must describe how you will manage data and management information (<i>in compliance with the POPI Act 4 of 2014</i>) such as traveller profiles, tracking of savings and missed savings, tracking of unused airline tickets, cancellation, traveller behaviour, and transaction level data.</li> <li>• Bidder must provide actual examples of standard reports they currently have available and examples of customised reports and dashboards.</li> </ul> <ul style="list-style-type: none"> <li>• Proposal aligned to all of the above = <b>15 points</b></li> <li>• Non-compliance or partial compliance with the above</li> </ul>	
<p><b>Cost Management and Value- Added Services</b></p>	<b>10</b>

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<ul style="list-style-type: none"> <li>• Bidder must provide detailed information on any value-added services on offer <b>5 = points</b></li> <li>• Bidder must describe how cost savings will be realised (demonstrate savings on annual travel spend and detailed strategic cost savings) <b>5 = points</b></li> <li>• Non-compliance or partial compliance with the above = <b>0 points</b></li> </ul>	
<b>TOTAL</b>	<b>100</b>

12.4 Bidders are required to pass the minimum threshold of **70 points** on the functional criteria to be considered for the next phase of evaluation which is **Phase 2B – Demonstrations**

12.5 Bidders who score less than **70 points** will not be considered for the next phase, thus will be disqualified, and will be declared non-responsive.

### 13 Booking System Demonstration Evaluation Criteria (Phase 2B)

13.1 The Bidders are required to **fully comply** with the below criteria in order to be considered for the next phase of evaluation which is Price and Specific goals – Phase 3.

13.2 Bidders will be given a 24-hour notice to come and demonstrate the online booking tool. The demonstrations will be held at the INSETA offices or online and will be communicated with all the bidders.

DESCRIPTION	COMPLY	NOT COMPLY
<b>Bidder must demonstrate an Online booking system reflecting the following:</b>		
1. Access, user rights, approval workflows (integration with the INSETA) approval levels.		
2. How INSETA travel consultant/ users' access and book web airfares, and hotel web rates.		
3. Data management information such as traveller profiles, tracking of savings and missed savings, tracking of unused airline tickets, cancellation, traveller behaviour (dashboard), and transaction level data.		
4. Standard reports currently have available and examples of customised reports and dashboards.		
<b>OVERALL STATUS</b>		

13.3 Bidders Bidders who **fully comply** with all the requirements of the above criteria will be eligible for further consideration on Phase 3 which is price and specific goals.

### 14 Price and Specific Points Evaluation (Phase 3)

#### 14.1 Preference Points Applied Against Specific Goals

The tender responses will be evaluated on the **80/20 preference point system for acquisition of goods or services with Rand value equal to or below R50 million.**

14.1.1 The lowest/ highest acceptable tender will be used to determine the accurate system once tenders are received.

14.1.2 Points for this tender (even in the case of a tender for income-generating contracts) shall be awarded for:

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- a) Price; and
- b) Specific Goals.

The maximum points for this tender are allocated as follows:

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

## 15 POINTS AWARDED FOR PRICE AND PREFERENCE POINTS

- (1) The following formula will be used to calculate the points out of 80 for price in respect of an invitation for a tender with a Rand value equal to or below R50 million, inclusive of all applicable taxes:

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

$P_{\min}$

Where:

- $P_s$  = Points scored for comparative price of bid under Consideration
- $P_t$  = Comparative price of bid under consideration
- $P_{\min}$  = Comparative price of lowest acceptable bid

- (2) A maximum of 20 points may be awarded to a tenderer for the specific goal specified for the tender.
- (3) The points scored for the specific goal must be added to the points scored for price and the total must be rounded off to the nearest two decimal places.
- (4) Subject to section 2(1)(f) of the Act, the contract must be awarded to the tenderer scoring the highest points.

**16 SPECIFIC GOALS PREFERENTIAL POINTS WILL BE AWARDED AS FOLLOWS:**

- 16.1 Table 1: Specific goals for the bid process and points claimed are indicated per the table below.
- 16.2 *The 80/20 preference point system is applicable, corresponding points must also be indicated as such. The tenderer must indicate how they claim points for each preference point system.*

The specific goals allocated points in terms of this tender	Number of points allocated (80/20-point system)
<b>Black Ownership</b> <ul style="list-style-type: none"> <li>• 6 points for 100% black owned</li> <li>• 3 points for 75-99% black owned</li> <li>• 1 point for 51-74% black owned</li> </ul>	(Maximum points = 6 points)
<b>Women Ownership</b> <ul style="list-style-type: none"> <li>• 6 points for 75% - 100%</li> <li>• 3 points for 51% - 74%</li> <li>• 1 point for below 51%</li> </ul>	(Maximum points = 6 points)
<b>Youth Ownership</b> <ul style="list-style-type: none"> <li>• 5 points for 75% - 100%</li> <li>• 3 points for 51% - 74%</li> <li>• 1 point for Below 51%</li> </ul>	(Maximum points = 5 points)
<b>Company-owned by People with disabilities</b> <ul style="list-style-type: none"> <li>• 3 points</li> </ul>	(Maximum points = 3 points)
<b>Total</b>	<b>20</b>

**Note:** Note: Evidence to be submitted by Service Providers: Emerging Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) – sworn affidavit (DTI or CIPC Template), Generic entities – B-BBEE certificate (SANAS accredited) and CSD report.

- 16.3 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.
- 16.4 The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the organ of state.

**17 Bid Procedure Conditions:**

- 17.1 Counter Conditions:  
The INSETA draws the bidders' attention that amendments to any of the Bid Conditions or setting of counter conditions by bidders will result in the invalidation of such bids.

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**17.1.1 Award Criteria: Due Diligence Process**

- 17.1.1.1 INSETA reserves the right to conduct due diligence/screen on the bidder prior to the award of a contract.
- 17.1.1.2 The due diligence/screening will be conducted based on the reference letters received from the bidder to confirm the services rendered and the standard of the bidder's performance.
- 17.1.1.3 Should such due diligence/ screening results have a negative outcome, the INSETA reserves the right not to award the bid to the subjected/recommended/highest scoring bidder.
- 17.1.1.4 The INSETA reserve a right not to award a bid to the highest scoring bidder but to award to a service provider who meet the requirement fully.
- 17.1.1.5 The due diligence method will be determined by the INSETA.
- 17.1.1.6 Non-contactable referees will lead to the failure of the due diligence process and will result in a negative outcome for the bidder.

**18 Bid requirements when bidding as the following:**

**18.1 Consortium**

- 18.1.1 A consortium is an association of two or more individuals, companies, organisations or governments (or any combination of these entities) with the objective of participating in a common activity or pooling their resources for achieving a common goal.
- 18.1.2 A consortium requires that each participant retains its separate legal status and the consortium's control over each participant is generally limited to activities involving the joint endeavour, particularly the division of profits. A consortium is formed by contract, which delignates the rights and obligations of each member.
- 18.1.3 In a consortium, only the lead bidder's credentials both in terms of financial and technical qualifications are considered. Therefore, the interpretation and application to the Bid process is such that the lead partner is identified and the following requirements are required as follows:
  - a) **Lead Partner**
    - All administrative documents (consortium agreement between the lead partner and the partner)
    - Technical requirements (which will show in the proposal and other requirements why the need for the consortium, which for all intent and purpose fulfils the requirements of the bid through combination of skills)
  - b) **Partner**
    - Proof of CSD registration.
    - Tax Pin.
    - B-BBEE Sworn-Affidavit.
    - SBD 4
- 18.1.4 It should be taken into cognisance that although the lead partner is the qualifying entity, the partner should prove that it can do business with state-owned entities, through CSD registration, proof that the taxes are compliant, its level of BBEE status in order to align with the BBEE status level required by the BID, declare interest and answer questions that it is not a disqualified entity with the National Treasury. The

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foregoing ensures compliance from an SCM process perspective that the consortium is in order.

18.1.5 Of importance is that in a consortium, each individual team members retain their identities.

## 18.2 A joint venture

18.2.1 A joint venture is a business entity created by two or more parties, generally characterized by shared ownership, returns and risks and shared governance.

## 18.3 Unincorporated joint venture:

18.3.1 All SCM documents are filled in by the joint venture in the name of the joint venture, although the submission of administrative documents (partnership agreement between parties) will be completed in the name of the joint venture, and the following will be required from both parties, amongst others

- a) SBD 4
- b) SBD 6
- c) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint B-BBEE Certificate.

## 18.4 Incorporated joint venture:

18.4.1 This aligned to a registered entity or company. A registered entity/ company with a consolidated B-BBEE certificate and a bank account in the name of the Joint venture. The required compliance documents must be complete by the entity/ company the name of the joint venture, and the following will be required amongst others

- a) SBD 4
- b) SBD 6
- c) Tax pin
- d) CSD registration.
- e) The JV agreement will direct which bank account of the two entities will be used.
- f) Consolidated Joint B-BBEE Certificate.

## 19 COMMUNICATION

19.1 Respondents are warned that a response will be disqualified should any attempt be made by a bidder either directly or indirectly to canvass any officer(s) or employees of INSETA in respect of BID process, between the closing date and the date of the award of the business.

All enquiries relating to this BID should be emailed **three days before the closing date.**

## 20 CONDITIONS TO BE OBSERVED WHEN BIDDING

20.1 The organization does not bind itself to accept the lowest or any BID, nor shall it be responsible for or pay any expenses or losses which may be incurred by the bidder in the preparation and

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delivery of his BID submission. The organization also reserves the right to withdraw or cancel the BID at any stage. No BID shall be deemed to have been accepted unless and until a formal contract / letter of award is prepared and executed. The competitive shall remain open for acceptance by the Organization for a period of **120 days** from the closing date of the BID Enquiry.

**INSETA reserves the right to:**

- 20.2 Not evaluate and award a bid that do not comply strictly with this BID document.
- 20.3 Make a selection solely on the information received in the Bid Document and Enter into negotiations with any one or more of preferred bidder(s) based on the criteria specified in the terms of reference.
- 20.4 Contact any bidder during the evaluation process, in order to clarify any information, without informing any other bidders. During the evaluation process, no change in the content of the BID shall be sought, offered or permitted.
- 20.5 Cancel this BID at any time as prescribed in the PPPFA.
- 20.6 Should bidder(s) be selected for further negotiations, they will be chosen on the basis of theof cost effectiveness and the principal of value for money not necessarily on the basis of the lowest costs.

## **21 ANONYMOUSLY REPORTING OF FRAUD**

- 21.1 Bidders are encouraged to report any incidents of • fraud • corruption • theft • misconduct or • unethical behaviour to the Vuvuzela Hotline. Contact number: 0800 119 691

## **22 COST OF BIDDING**

- 22.1 The bidder shall bear all costs and expenses associated with preparation and submission of its BID submission and the INSETA shall under no circumstances be responsible or liable for any such costs, regardless of, without limitation, the conduct or outcome of the bidding, evaluation, and selection process.

## **END OF TERMS OF REFERENCE DOCUMENT**