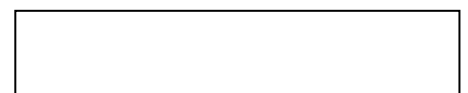




<b>RFB NUMBER:</b>	<b>C-BRTA/HO/0059</b>
<b>DESCRIPTION:</b>	<b>REQUEST FOR BID: TRAVEL MANAGEMENT SERVICES OVER THE PERIOD OF 36 MONTHS</b>
<b>PUBLISH DATE:</b>	<b>16 OCTOBER 2020</b>
<b>COMPULSORY BRIEFING SESSION DATE</b>	<b>23 OCTOBER 2020 AT 11H00</b>
<b>VALIDITY PERIOD:</b>	<b>90 DAYS FROM CLOSING DATE</b>
<b>CLOSING DATE:</b>	<b>06 NOVEMBER 2020</b>
<b>CLOSING TIME:</b>	<b>14H00</b>
<b>BID RESPONSES MUST BE HAND DELIVERED / COURIERED TO:</b>	<b>C-BRTA 350 WICTH-HAZEL AVENUE, ECO POINT OFFICE PARK, BLOCK A, ECO- PARK, CENTURION PRETORIA (Bid Box at Reception)</b>
<b>ATTENTION:</b>	<b>Supply Chain Management</b>
<b>NB: Bidders must ensure that they sign the register at the reception when delivering their bids</b>	

**BIDDER NAME:** \_\_\_\_\_



- Bidders should ensure that Bids are delivered in time to the correct address. If the bid is late, it shall not be accepted for consideration.
- The C-BRTA reception is accessible from (07h30 to 16h00); 5 days a week (Monday to Friday).
- Bidders must ensure that they **sign the register** at the reception when delivering Bids.
- Bidders must advise their couriers of the instruction above to avoid misplacement of bid responses.

ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS – (NOT TO BE RE-TYPED)

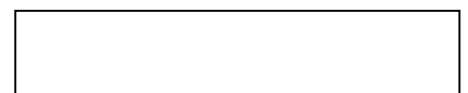
THIS BID IS SUBJECT TO THE GENERAL CONDITIONS OF THE BID, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT.

**THE FOLLOWING PARTICULARS MUST BE FURNISHED (FAILURE TO DO SO SHALL RESULT IN YOUR BID BEING DISQUALIFIED)**

**BIDDING STRUCTURE**

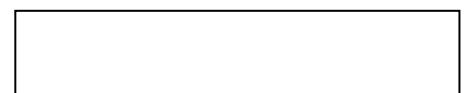
Indicate the type of Bidding structure by marking with an 'X':	
Individual bidder	
Joint venture	
Consortium	
Using Subcontractors	
Other	

<b>If individual bidder, indicate the following:</b>	
Name of bidder	
Registration number	
VAT registration number (where applicable)	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

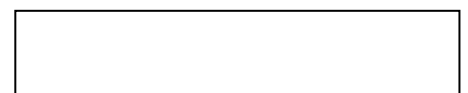


<b>If Joint Venture or Consortium, indicate the following:</b>	
Name of prime contractor	
Registration number	
VAT registration number (where applicable)	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	

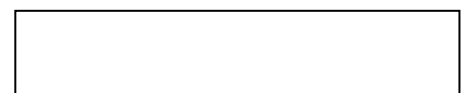
<b>If Joint Venture or Consortium, indicate the following:</b> <i>(To be completed for each JV/ Consortium member)</i>	
Name of Joint Venture/ Consortium member	
Registration number	
VAT registration number (where applicable)	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	



<b>If using subcontractors, indicate the following:</b>	
Name of prime contractor	
Registration number	
VAT registration number (where applicable)	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	



<b>If using subcontractors, indicate the following:</b> <i>(To be completed for each subcontractor)</i>	
Name of subcontractor	
Registration number	
VAT registration number (where applicable)	
Contact person	
Telephone number	
Fax number	
E-mail address	
Postal address	
Physical address	



**TABLE OF CONTENTS FOR RFB: C-BRTA/HO/0059**

- 1. CHECKILIST OF DOCUMENTS TO BE SUBMITTED**
- 2. CONDITIONS AND UNDERTAKINGS BY BIDDER**
- 3. BID CONDITIONS**
- 4. GENERAL CONDITIONS OF CONTRACTS**
- 5. TERMS OF REFERENCE**

**ANNEXURES:**

**ANNEXURE A: SBD 1 - INVITATION TO BID**

**ANNEXURE B: SBD 2 – TAX CLEARANCE REQUIREMENTS**

**ANNEXURE C: SBD 3.2. PRICING SCHEDULE**

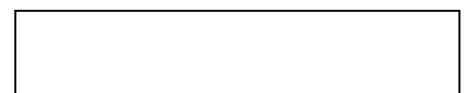
**ANNEXURE D: SBD 4 - DECLARATION OF INTEREST**

**ANNEXURE E: SBD 6.1 – PREFERENCE CLAIM FORM IN TERMS OF THE  
PREFERENTIAL PROCUREMENT REGULATION 2017**

**ANNEXURE F: SBD 7 - CONTRACT FORM**

**ANNEXURE G: SBD 8 - DECLARATION OF BIDDERS PAST SUPPLY CHAIN  
MANAGEMENT PRACTICES**

**ANNEXURE H: SBD 9 - CERTIFICATE OF INDEPENDENT BID DETERMINATION**



**1. Checklist of documents to be submitted:**

**Please tick in the relevant block below**

**YES      NO**

           One original Bid document suite with three copies

**Please ensure that the following compulsory documents are completed / attached:**

**YES      NO**

           Proof of registration with Central Supplier Database (CSD) or proof registration with CSD in progress. CSD registration can be done at [www.csd.gov.za](http://www.csd.gov.za)

           Completed Bid Conditions

           Signed General Condition of Contract

           Completed SBD 1: Invitation to Bid

           Completed SBD 3.3: Pricing schedule

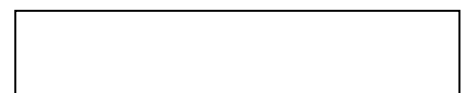
           Completed SBD 4: Declaration of interest

           Completed SBD 6.1.: Preference Points Claim form in terms of the Preferential Procurement Regulations 2017 (attach BBBEE Certificate)

           Completed SBD 7.2: Contract Form

           Completed SBD 8: Declaration of Bidder Past Supply Chain Management Practices

           SBD 9: Certificate of Independent Bid Determination



Kindly take note that:

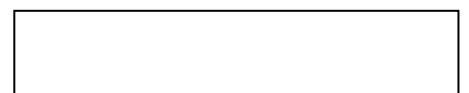
1. Should all of these documents not be included and or fully completed, the bidder **WILL** be disqualified on the basis of non-compliance.
2. The same documents must be submitted for all other companies that are involved in the Bid in case of a consortium.

\_\_\_\_\_  
**Signed**

\_\_\_\_\_  
**Name in Print**

\_\_\_\_\_  
**Capacity**

\_\_\_\_\_  
**Date**





## 2. Conditions and Undertakings by Bidder

- **The Bid forms should not be retyped, but photocopies may be prepared and used.** However, only documents with the original signature in black ink shall be accepted. Additional offers against any item should be made on a photocopy of the page in question.
- Black ink should be used when completing Bid documents.
- Bidders should check the numbers of the pages to satisfy themselves that none is missing or duplicated. C-BRTA will accept NO liability in regard to anything arising from the fact that pages are missing or duplicated.
- I/We hereby Bid to supply all or any of the supplies and/or to procure all or any of the services described in the attached documents to C-BRTA on the terms and conditions and in accordance with the specifications stipulated in the Bid documents (and which shall be taken as part of, and incorporated into, this Bid) at the prices inserted therein.
- I/We agree that the offer herein shall remain binding upon me/us and open for acceptance by C-BRTA during the validity period indicated and calculated from the closing hour and date of the Bid;
- the laws of the Republic of South Africa shall govern the contract created by the acceptance of my/our Bid and that I/we choose domicilium citandi et executandi in the Republic as indicated below; and

**NB:** BIDDERS TERMS AND CONDITIONS ARE NOT ACCEPTABLE.

- I/We furthermore confirm that I/we have satisfied myself/ourselves as to the correctness and validity of my/our Bid that the price(s) and rate(s) quoted cover all the work/item(s) specified in the Bid documents and that the price(s) and rate(s) cover all my/our obligations under a resulting contract and that I/we accept that any mistakes regarding price(s) and calculations will be at my/our risk.
- I/We hereby accept full responsibility for the proper execution and fulfillment of all obligations and conditions devolving on me/us under this Bid as the Principal(s) liable for the due fulfillment of this contract.

---

Signature(s) of Bidder or  
assignee(s)

Date

---

Name of signing person (in block  
letters)

---

Capacity

---

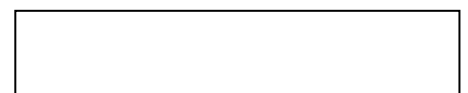
Are you duly authorized to sign this  
bid?

---

Name of Bidder [company name]  
(in block letters)

---

Postal address (in block letters)

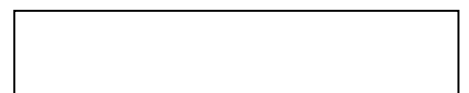


Domicilium citandi et executandi in the RSA (full street address of this place) (in block letters)

.....  
.....  
.....  
.....

Telephone Number: ..... Fax Number: .....

Cell Number: .....



### 3. Bid Conditions

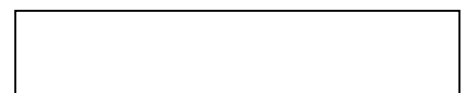
Bidders shall provide full and accurate answers to all (including mandatory) questions posed in this document, and, are required to explicitly state either "Comply" or "Not Comply" or "Partial" (with a √)" regarding compliance with the requirements. Where necessary, the bidder shall substantiate their response to a specific question.

**It is mandatory for the bidders to comply with the all bid conditions indicated as follows.**

- A "√" under "Comply" will be interpreted as full compliance / acceptance to the applicable paragraph.
- A "√" under "Not Comply" will be interpreted that the Bidder/s has/have read and understood the paragraph, but the bidder does **not accept** the content of the applicable paragraph and will be disqualified.
- A "√" under "Partial" will be interpreted and evaluated objectively against explanations and supporting documentation accordingly. Note: **If PARTIAL is indicated as the level of compliance and NO supporting documentation is provided that clearly clarifies the Bidder/s position, the paragraph will be evaluated as "Non Comply" and will be disqualified.**

The following bid conditions will govern the contract between the C-BRTA and the successful bidder:

Requirement	Comply	Partial Comply	Not Comply
3.1. Bidders are invited to offer the Services in accordance with the attached Specifications and the conditions within this document.			
3.2. Successful Bidder/s will be contracted to procure the Services for a period to be agreed after which C-BRTA reserves the right to review and extend the contract for further period/s at the C-BRTA discretion.			
3.3. The fees will be negotiated.			
Interpretation of requirements	Comply	Partial Comply	Not Comply
3.4. The Bidder/s shall accept C-BRTA interpretation of any specific requirement in the Bid documents or Specifications should there be a difference of interpretation between the Bidder/s and C-BRTA. Should any dispute arise as a result of this Bid and / or the subsequent contract, which cannot be settled to the mutual satisfaction of the Bidder/s and C-BRTA, it shall be dealt with in terms of General Conditions of Contract of this document.			



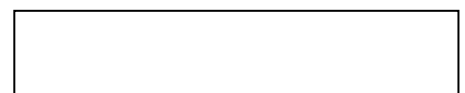
3.5. Should there be any discrepancies between the Bid conditions and any other documentation that forms part of this Bid, the Bid conditions shall take preference.			
<b>Documentation</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.6. Fully comprehensive service documentation shall be supplied in English by each Bidder, which shall explicitly and detail, describe the service/s offered. This documentation shall include sufficient detail to clearly give the reader a precise and unambiguous description of the service/s offered. Incomplete or incomprehensive service documentation will result in rejection of the offer.			
3.7. Bidder's name and address should clearly appear on the outside of Bid documents and on envelope.			
3.8. Acceptance of any Bids will only indicate, without any obligations on the part of either C-BRTA and/or a Bidder, the willingness of such parties to enter into negotiations, which may or may not result in a contract/order as the case may be.			
3.9. C-BRTA reserves the right to make a selection solely on the information received in the Bids or to negotiate further with one or more Bidder/s.			
3.10. The Bidder/s selected for further negotiations, if any, will be chosen on the basis of the greatest benefit to C-BRTA and not necessarily on the basis of lowest price or any other criteria.			
3.11. Should C-BRTA consider it necessary, the Bidder/s shall agree to an inspection of the resources and works of the Bidder, if so requires.			
3.12. Should C-BRTA consider it necessary, C-BRTA will visit the Bidder/s customer sites.			
3.13. C-BRTA reserves the right:			
3.13.1. to cancel this Bid at any time;			



3.13.2. not to accept any Bids;			
3.13.3. to accept one or more Bids for further negotiation and;			
3.13.4. to contact any Bidder during the evaluation period, to clarify information only, without informing any other Bidder.			
<b>Copyright</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.14. The specifications are the intellectual property of C-BRTA.			
3.15. The contents of any specifications are the property of C-BRTA and are confidential. It shall not in any manner be reproduced, destroyed, lent or given away without the permission.			
<b>Precedence</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.16. All details, dimensions and instructions shown on any drawings, diagrams and specifications quoted, shall form part of this bid document.			
3.17. If there is any contradictory requirements between the specifications, the drawings referred to and other specifications that have been quoted, the order of precedence, from highest to lowest is: <ul style="list-style-type: none"> <li>• Statutory and mandatory requirements,</li> <li>• This bid document,</li> <li>• Contract Conditions.</li> </ul>			
<b>Alternative suppliers</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.18. The Bidder accepts that the C-BRTA will have the right to contract with any other Service Provider for provision of services not covered by this specification.			
3.19. Bidder must also submit: A written statement to the specification of C-BRTA by the bidder, that none of his shareholders, personnel and partners have any			



involvement or writing the specification of this bid.			
<b>Submission of Bid</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.20. C-BRTA will also reject an offer if the Bidder/s fail to complete the compliance section/s in the format as previously described.			
<b>Service approval</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.21. The Procuring of the Services shall not take place until C-BRTA has given final approval of all procedures.			
<b>Additional Criteria</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.22. C-BRTA will evaluate the bids against the following criteria: <ul style="list-style-type: none"> <li>• Compliance to the Specifications/ Functionality</li> <li>• Price</li> <li>• BBEE</li> <li>• Compliance to Bid Conditions</li> </ul>			
<b>Broad Based Black Economic Empowerment</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.23. C-BRTA has established a programme of economic empowerment in its procurement strategies. In this regard, companies are required to indicate their involvement, current and planned, with black businesses and professionals. This will form an important part of the evaluation criteria to be used. C-BRTA reserves the right to request all relevant information, agreements and other documents to verify information supplied in response hereto.			
<b>Addenda</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.24. In the event that modifications, clarifications or additions which will form			



addenda to the RFB become necessary, all Bidders will be notified, in writing.			
<b>Preparation Costs</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.25. All costs incurred in the preparation, presentation and demonstration of the response shall be for the account of the bidder. All supporting documentation and manuals submitted with the Bid will become C-BRTA property unless otherwise stated by the Bidder/s at the time of submission.			
<b>Confidential Material</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.26. Any material submitted by the Bidder/s, which is considered to be confidential in nature, must be clearly marked as such.			
<b>Payment Terms – Local Creditors</b>	<b>Comply</b>	<b>Partial Comply</b>	<b>Not Comply</b>
3.27. Payments of invoices will be effected within 30 days of receipt of a correct and original invoice.			
3.28. Invoices and statements should be submitted after C-BRTA has acknowledged receipt of the services procured or goods supplied.			

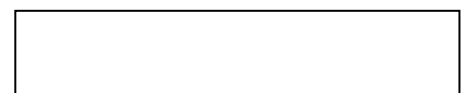
**Please note and accept the following clauses of C-BRTA conditions and Procedures governing the Procurement of Services.**

**3.29. Contract Negotiations**

The C-BRTA, together with the successful Bidder, will work out the service levels indicating activities, staff, and logistics and reporting, as per the Master Service Agreement (MSA). The agreed program and service levels will then be incorporated in the “Support Services SOW” and will form part of the agreement.

**3.30. Awarding the Bid**

The C-BRTA reserves the right to award to one or more Bidders. All Bidders will be notified of the Bid Outcomes after final award.



### **3.31. Contract Termination**

A contract/s with a successful Bidder/s may be terminated by the C-BRTA on the grounds of valid commercial or operational requirements that were not foreseen at the time of the Request for Bid being submitted and the contract being entered into. The C-BRTA, if it wishes to terminate the contract, shall be required to give 30 (thirty) days written notice of its intention to terminate the contract. Such notice must be preceded by bona fide discussion between the C-BRTA and the successful Bidder. In this instance the C-BRTA shall only remain liable for all amounts due to the successful Bidder with respect to the period ending on the date of the cancellation and shall not be held liable for any damages or losses on the basis of such a termination of the contract.

### **3.32. Dispute Resolution**

3.32.1. All disputes arising out of this Bid or relating to the legal validity of this Bid or any part thereof shall be resolved under this paragraph. The parties must refer any dispute to be resolved by:

- Negotiation, in terms of paragraph 3.31.3; failing which
- Mediation, in terms of paragraph 3.31.4; failing which
- Arbitration, in terms of paragraph 3.31.6.

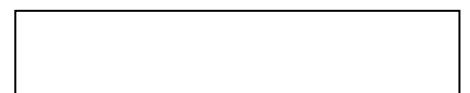
3.32.2. In the Paragraph Clause 3.31.1 shall not preclude any party from access to an appropriate court of law for interim relief in respect of urgent matters by way of an interdict, or mandamus pending finalization of the dispute resolution process contemplated in paragraph 3.31.1, for which purpose the parties irrevocably submit to the jurisdiction of a division of the High Court of the Republic of South Africa.

3.32.3. Within ten (10) days of notification, the parties must seek an amicable resolution to the dispute by referring the dispute to designated and authorized representatives of each of the parties to negotiate and resolve the dispute. If an amicable resolution to the dispute is found the authorized representatives of the parties must sign, within the ten (10) day period, a statement confirming that the dispute has been resolved.

3.32.4. If negotiation in terms of paragraph 3.31.3 fails, the parties must, within fifteen (15) days of the negotiations failing, refer the dispute for resolution by mediation under the rules of the Arbitration Foundation of Southern Africa (or its successor or body nominated in writing by it in its stead).

3.32.5. The periods for negotiation (specified in paragraph 3.31.3) or for referral of the dispute for mediation (specified in paragraph 3.31.4.), may be shortened or lengthened by written agreement between the parties.

3.32.6. In the event of the mediation contemplated in paragraph 3.31.3 failing the parties shall refer the dispute, within fifteen (15) days of the mediation failing, for resolution by expedited arbitration under the current rules of the Arbitration Foundation of Southern Africa (or its successor or body nominated in writing by it in its stead).





3.32.7. A single arbitrator shall be appointed by agreement between the parties within ten (10) days of the dispute being referred for arbitration, failing which the arbitrator shall be appointed by the Secretariat of the Arbitration Foundation of Southern Africa (or its successor or body nominated in writing by it in its stead).

3.32.8. At all times, every reasonable effort shall be made to ensure that such arbitrator has the necessary technical skills to enable him to adjudicate the dispute in a satisfactory manner.

3.32.9. The arbitration shall be held at Sandton, South Africa, in English.

3.32.10. The South African law shall apply.

3.32.11. The parties shall be entitled to legal representation.

3.32.12. The award of the arbitrator shall be final and binding on the parties, who hereby agree to give effect to the award. Either party shall be entitled to have the arbitrator's award made an order of court at the cost of the party requesting same.

3.32.13. This paragraph shall constitute the irrevocable consent of the parties to the dispute resolution proceeding in terms hereof and neither of the parties shall be entitled to withdraw there from or to claim at any arbitration proceedings that they are not bound by the arbitration provisions of this Bid.

3.32.14. Both parties shall comply with all the provisions of the RFB and with all due diligence during the determination of such dispute should the latter arise during the course of the RFB.

### **3.33. PAYMENT TERMS - LOCAL CREDITORS**

3.33.1. Original, detailed, correct and complete tax invoices, monthly statements (where applicable), VAT registration numbers (where applicable), verification of bank details (in the format required) and any other relevant supporting documents must be submitted to the C-BRTA after it has acknowledged receipt in writing of the services procured or goods received, to its satisfaction.

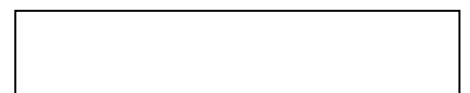
3.33.2. Payment shall be effected by electronic bank transfer or any other method of payment decided to be used by the C-BRTA from time to time and at the C-BRTA's sole discretion.

3.33.3. Payment shall furthermore be subject to the C-BRTA's standard Special Terms and Conditions of Contract, which if applicable shall prevail over this clause in all instances.

### **3.34. TERMINATION**

3.34.1. The following clause will be applicable to all contracts entered into/orders placed by C-BRTA:

If, at any time during the currency of this Bid and subsequent contract/order, C-BRTA in its reasonable discretion determines that the other party has, in respect of this bid,



contract/order or any other contract/order or agreement to which they were or are parties to:

- (a) Acted dishonestly and/or in bad faith, and/or
- (b) Has made any intentional or negligent misrepresentation to C-BRTA whether in any negotiations preceding the conclusion of, or in the execution of this RFB or any other agreement between the parties,

Then C-BRTA shall be entitled by written notice to the other party forthwith to cancel this contract/order. Upon such cancellation, C-BRTA shall be entitled, in addition to all other remedies available to it, to recover from the other party all damages it has suffered by virtue of such conduct by the other party. The C-BRTA shall be entitled to withhold payment in respect thereof for a period of 90 (ninety) days from the date of cancellation in order to investigate the party's conduct and any damages suffered by C-BRTA. No payment by C-BRTA to the other party after the lapse of such period shall preclude C-BRTA thereafter, from recovering from the other party any such damages as it may have suffered.

### **3.35. SPECIFIC INFORMATION REQUIRED**

For ease of reference and evaluating purposes, please furnish replies under the same headings and refer individually to all specific paragraph numbers. Please be clear in your response and use definite answers.

### **3.36. COPIES REQUIRED**

Bidders are required to submit One Original, together with three (3) copies clearly marked "original" and "copy".

### **3.37. GENERAL VENDOR INFORMATION**

The following general information is required from the prospective vendor:

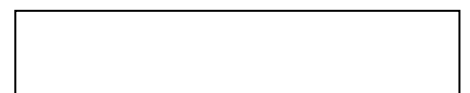
Name of Company/Trading as:

- Postal Address
- Street Address
- Telephone and facsimile numbers
- Company Head Office:
- Postal Address
- Street Address
- Telephone and facsimile numbers
- Contact Numbers

List of Directors/Partners/affiliated companies with proof of shareholding with this companies/trust - **Compulsory**

List of shareholders (Certified original copies of individual share certificates/certified original copies of Cipro registration document indicating the following - **Compulsory**

- (a) members with percentage interest



- (b) date of registration
- (c) Company registration number

Draw or attach the organizational structure of your company:

- a) Ownership structure, i.e. the % shareholding by major investors and controlling interest in affiliated companies.
- b) Basic functional structure, i.e. the administrative section of your company with which C-BRTA will be dealing on a day-to-day basis.

### **3.38. INFRASTRUCTURE**

- Would you describe your business as international, national or regional?
- All branches and offices of your company countrywide (Republic of South Africa) together with telephone numbers.

### **3.39. ACTIVITY AND SERVICE PROFILE**

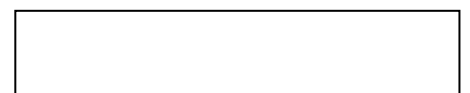
- Detailed description of main field of expertise/area of operation of company.
- Range of services offered.
- Reference list of some contracts completed during the last 3 to 5 years, including value, duration, location and contact persons

### **3.40. REASONS FOR DISQUALIFICATION**

3.40.1. The C-BRTA reserves the right to disqualify any bidder which does any one or more of the following, and such disqualification may take place without prior notice to the offending bidder, however the bidder shall be notified in writing of such disqualification:

- (a) bidders who do not have a valid Tax Clearance at the time of award;
- (b) bidders who submitted incomplete information, incomplete annexures and documentation according to the requirements of this Bid;
- (c) bidders who submitted information that is fraudulent, factually untrue or inaccurate, for example memberships that do not exist, BBBEE credentials, experience, etc.;
- (d) bidders who received information not available to other vendors through fraudulent means;
- (e) bidders who submit tippexed bids; and/or
- (f) bidders who do not comply with mandatory requirements as stipulated in this Bid.

3.40.2. There shall be **no public opening** of the Bids received; however, the list of bids received will be published on the C-BRTA website. There shall be no discussions with



any enterprise until evaluation of the proposal has been completed. Any discussions shall be at the discretion of the C-BRTA.

3.40.3.No Bids from any bidder with offices within the RSA shall be accepted if sent via the Internet or e-mail.

**3.41. ENQUIRIES**

Enquiries regarding this Bid should be submitted via e-mail quoting the bid number to:

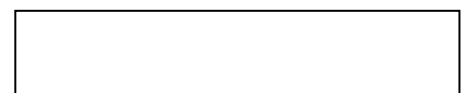
Acting Supply Chain Manager	<b>morwamoche.sekhukhune@cbrta.co.za</b>
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Enquiries should reference specific paragraph numbers, where appropriate.

All questions / enquiries must be forwarded in writing not later than **14h00** on **26 October 2020**.

Questions / enquiries received on **26 October 2020** after **14h00** **WILL NOT** be considered.

Responses will be emailed to all bidders who attended the briefing session on **29 October 2020 at 15h00**.



## **4. GENERAL CONDITIONS OF CONTRACT**

### **4.1. Definitions**

The following terms shall be interpreted as indicated:

4.1.1 “Closing time” means the date and hour specified in the bidding documents for the receipt of bids.

4.1.2 “Contract” means the written agreement entered into between the purchaser and the supplier, as recorded in the contract from signed by the parties, including all attachments and appendices thereto and all documents incorporated by reference therein.

4.1.3 “Contract price” means the price payable to the supplier under the contract for the full and proper performance of this contractual obligation.

4.1.4 “Corrupt practice” means the offering, giving, receiving, or soliciting of anything of value to influence the action of a public official in the procurement process or in contract execution.

4.1.5 “Countervailing duties” are imposed in cases where an enterprise abroad is subsidized by its government and encouraged to market its products internationally.

4.1.6 “Country of origin” means the place where goods were mined, grown or produced or from which the services are supplied. Goods are produced when, through manufacturing, processing or substantial and major assembly of components, a commercially recognized new product results that is substantially different in basis characteristics or in purpose or utility from its components.

4.1.7 “Day” means calendar day.

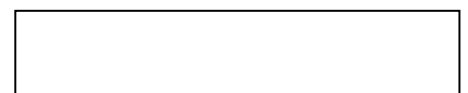
4.1.8 “Delivery” means delivery in compliance of the conditions of the contract or order

4.1.9 “Delivery ex stock” means immediate delivery directly from stock actually on hand.

4.1.10 “Delivery into consignee’s store or to his site” means delivered and unloaded in the specified store or depot or on the specified site in compliance with the conditions of the contract or order, the supplier bearing all risks and charges involved until the supplies are so delivered and a valid receipt is obtained.

4.1.11 “Dumping” occurs when a private enterprise abroad markets its good on own initiative in the RSA at lower prices than that of the country or origin and which have the potential to harm the local industries in the RSA.

4.1.12 “Force majeure” means an event beyond the control of the supplier and not involving the supplier’s fault or negligence and not foreseeable. Such events may include, but is not restricted to, acts of the purchaser in its sovereign capacity, wars or resolutions, fires floods, epidemics, quarantine restrictions and freight embargoes.



4.1.13 “Fraudulent practice” means a misrepresentation of facts in order to influence a procurement process or the execution of a contract to the detriment of any bidder and includes collusive practice among bidders (prior to or after bid submission) designed to establish bid prices at artificial non-competitive levels and to deprive the bidder of the benefits of free and open competition.

4.1.14 “GCC” mean the General Conditions of Contract.

4.1.15. “Good” means all of the equipment, machinery, and/or other materials that the supplier is required to supply to the purchaser under the contract.

4.1.16. “Imported content” means that portion of the bidding price represented by the cost of components, parts or materials which have been or are still to be imported (whether by the supplier or his subcontractors) and which costs are inclusive of the costs abroad, plus freight and other direct importation costs such as landing costs, dock dues, import duty, sales duty or other similar tax or duty at the South African place of entry as well transportation and handling charges to the factory in the Republic where the supplies covered by the bid will be manufactured.

4.1.17. “Local content” means that portion of the bidding price, which is not included in the imported content provided that local manufacture does take place.

4.1.18. “Manufacture” means the production of products in a factory using labour, materials components and machinery and includes other related value-adding activities.

4.1.19. “Order” means an official written order issued for the supply of goods or works or the procuring of a service.

4.1.20. “Project site” where applicable, means the place indicated in bidding documents.

4.1.21. “Purchaser” means the organization purchasing the goods.

4.1.22. “Republic” means the Republic of South Africa.

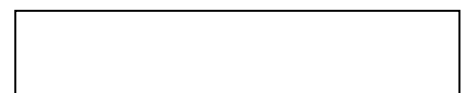
4.1.23. “SCC” means the Special Conditions of Contract.

4.1.24. “Services” means those functional services ancillaries to the supply of the goods, such as transportation and any other incidental services, such as installation, commissioning, provision of technical assistance, training, catering, gardening, security, maintenance and other such obligations of the supplier covered under the contract.

4.1.25. “Written” or “in writing” means handwritten in ink or any form of electronic or mechanical writing.

## **4.2. Application**

4.2.1. These general conditions are applicable to all bids, contracts and orders including bids for functional and professional services, sales, hiring, letting and the granting or acquiring of rights, but excluding immovable property, unless otherwise indicated in the bidding documents.



4.2.2. Where applicable, special conditions of contract are also laid down to cover specific supplies, services or works.

4.2.3. Where such special conditions of contract are in conflict with these general conditions, the special shall apply.

### **4.3. General**

4.3.1. Unless otherwise indicated in the bidding documents, the purchase shall not be liable for any expense incurred in the preparation and submission of a bid. Where applicable a non-refundable fee for documents may be charged.

4.3.2. With certain exceptions, invitations for bid are only published in the Government Tender Bulletin. The Government Tender Bulletin may be obtained directly from the Government Printer, Private Bag X85, Pretoria 0001, or accessed electronically from [www.treasury.gov.za](http://www.treasury.gov.za).

### **4.4. Standards**

4.4.1. The goods supplied shall conform to the standards mentioned in the bidding documents and specifications.

### **4.5. Use of contracts documents and information**

4.5.1. The supplier shall not, without the purchaser's prior written consent, disclose the contract, or any provision thereof, or any specification, plan, drawing, pattern, sample or information furnished by or on behalf of the purchaser in connection therewith, to any person other than a person employed by the supplier in the performance of the contract. Disclosure to any such employed person shall be made in confidence and shall extend only as far as may be necessary for purposes of such performance.

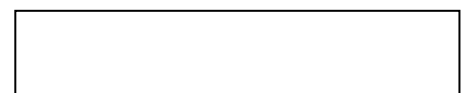
4.5.2. The supplier shall not, without the purchaser's prior written consent, make use of any document or information mentioned in GCC clause 4.5.1 except for purposes of performing the contract.

4.5.3 Any document, other than the contract itself mentioned in GCC clause 4.5.1 shall remain the property of the purchaser and shall be returned (all copies) to the purchaser on completion of the supplier's performance under the contract if so required by the purchaser.

4.5.4. The supplier shall permit the purchaser to inspect the supplier's records relating to the performance of the supplier and to have them audited by auditors appointed by the purchaser, if so required by the purchaser.

### **4.6. Patent rights**

4.6.1. The supplier shall indemnify the purchaser against all third-party claims of infringement of patent, trademark, or industrial design rights arising from use of the goods or any part thereof by the purchaser.



#### **4.7. Performance Security**

4.7.1. Within thirty (30) days of receipt of the notification of contract award, the successful bidder shall furnish to the purchaser the performance security of the amount specified in GCC.

4.7.2. The proceeds of the performance security shall be payable to the purchaser as compensation for any loss resulting from the supplier's failure to complete his obligations under the contracts.

4.7.3. The performance security shall be denominated in the currency of the contract, or in freely convertible currency acceptable to the purchaser and shall be in one of the following:

- (a) a bank guarantee or an irrevocable letter of credit issued by a reputable bank located in the purchaser's country or broad, acceptable to the purchaser, in the form provided in the bidding documents or another form acceptable to the purchaser; or
- (b) a cashier's or certified cheque

4.7.4. The performance security will be discharged by the purchaser and returned to the supplier not later than thirty (30) days following the date of completion of the supplier's performance obligations under the contract, including any warranty obligations, unless otherwise specified in SCC.

#### **4.8. Inspections, tests and analyses**

4.8.1. All pre-bidding testing will be for the account of the bidder.

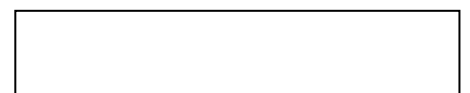
4.8.2. If it is a bid condition that supplies to be produced or services to be procured should at any stage during production or execution or on completion be subject to inspection, the premises of the bidder or contractor shall be open, at all reasonable hours, for inspection by a representative of the Department or an organization acting on behalf of the Department.

4.8.3. If there are no inspection requirements indicated in the bidding documents and no mention is made in the contract, but during the contract period it is decided that inspections shall be carried out, the purchaser shall itself make the necessary arrangements, including payments arrangements with the testing authority concerned.

4.8.4. If the inspection, test and analyses referred to in clauses 4.8.2 and 4.8.3 show the supplies to be in accordance with the contract requirements, the cost of the inspections, tests and analyses shall be defrayed by the purchaser.

4.8.5. Where the supplies or services referred to in clauses 4.8.2 and 4.8.3 do not comply with the contract requirements, irrespective of whether such supplies or services are accepted or not, the cost in connection with these inspections, tests or analyses shall be defrayed by the supplier.

4.8.6. Supplies and services, which are, referred to in clauses 4.8.2 and 4.8.3 and which do not comply with the contract requirements may be rejected.





4.8.7. Any contract supplies may, on or after delivery, be inspected; tested or analyzed and may be rejected if found not to comply with the requirements of the contract. Such rejected supplies shall be held at the cost and risk of the supplier who shall, when called upon, remove them immediately at his own cost and forthwith substitute them with supplies which do comply with the requirements of the contract. Failing such removal the rejected supplies shall be returned at the suppliers cost and risk. Should the supplier fail to provide the substitute supplies forthwith, the purchase may without giving the supplier further opportunity to substitute the rejected supplies purchase such supplies as may be necessary at the expense of the supplier.

4.8.8. The provisions of clauses 4.8.4 to 4.8.7 shall not prejudice the right of the purchaser to cancel the contract on account of a breach of the conditions thereof, or to act in terms of Clause 5. 23 of GCC.

#### **4.9. Packing**

4.9.1. The supplier shall provide such packing of the goods as is required to prevent their damage or deterioration during transit to their final destination, as indicated in the contract. The packing shall be sufficient to withstand, without limitation, rough handling during transit and exposure to extreme temperatures, salt and precipitations during transit, and open storage. Packing, case size and weights shall take into consideration, where appropriate, the remoteness of the goods' final destination and the absence of heavy handling facilities at all points in transit.

4.9.2. The packing, marking and documentation within and outside the packages shall comply strictly with such special requirements as shall be expressly provided for in the contract, including additional requirements, if any, specified in SCC, and in any subsequent instructions ordered by the purchaser.

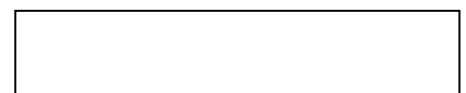
#### **4.10. Delivery and documents**

4.10.1. Delivery of the goods shall be made by the supplier in accordance with the terms specified in the contract. The details of shipping and/or other documents to be furnished by the supplier are specified in SCC.

4.10.2. Documents to be submitted by the supplier are specified in SCC.

#### **4.11. Insurance**

4.11.1. The goods supplied under the contract shall be fully insured in a freely convertible currency against loss or damage incidental to manufacture or acquisition, transportation, storage and delivery in the manner specified in the SCC.



#### **4.12. Transportation**

4.12.1. Should a price other than an all-inclusive delivered price be required, this shall be specified in the SCC.

#### **4.13. Incidental services**

4.13.1. The supplier may be required to provide any or all of the following services, including additional services, if any specified in SCC:

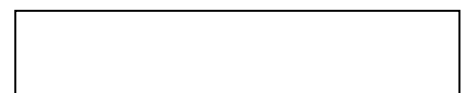
- (a) performance or supervision of on-site assembly and/or commissioning of the supplied goods;
- (b) furnishing of tools required for assembly and/or maintenance of the supplied goods;
- (c) furnishing of a detailed operations and maintenance manual for each appropriate unit of the supplied goods;
- (d) performance or supervision or maintenance and/or repair of the supplied goods, for a period of time agreed by the parties, provided that this service shall not relieve the supplier of any warranty obligations under this contract; and
- (e) training of the purchaser's personnel, at the supplier's plant and/or on-site, in assembly, start-up, operation, maintenance, and/or repair of the supplied goods.

4.13.1. Prices charged by the supplier for incidental services, if not included in the contract price for the goods, shall be agreed upon in advance by the parties and shall not exceed the prevailing rates charged to other parties by the supplier for similar services.

#### **4.14. Spare parts**

4.14.1. As specified in SCC, the supplier may be required to provide any or all of the following materials, notifications, and information pertaining to spare parts manufactured or distributed by the supplier:

- (a) such spare parts as the purchaser may elect to purchase from the supplier, provided that this election shall not relieve the supplier of any warranty obligations under the contract and
- (b) in the event of termination of production of the spare parts:
  - (i) Advance notification to the purchaser of the pending termination, in sufficient time to permit the purchaser to procure needed requirements; and
  - (ii) Following such termination, furnishing at no cost to the purchaser, the blueprints, drawings and specifications of the spare parts, if requested.



#### **4.15. Warranty**

4.15.1. The supplier warrants that the goods supplied under the contract are new, unused, of the most recent or current models and that they incorporate all recent improvements in design and materials unless provided otherwise in the contract. The supplier further warrants that all goods supplied under this contract shall have no defect, arising from design, materials, or workmanship (except when the design and/or material is required by the purchaser's specifications) or from any act or omission of the supplier, that may develop under normal use of the supplied goods in the conditions prevailing in the country of final destination.

4.15.2. This warranty shall remain valid twelve (12) months after the goods, or any portion thereof as the case may be, have been delivered to and accepted at the final destination indicated in the contract, or for eighteen (18) months after the date of shipment from the port or place of loading in the source country, whichever period concludes earlier, unless specified otherwise in SCC.

4.15.3. The purchaser shall promptly notify the supplier in writing of any claims arising under this warranty.

4.15.4. Upon receipt of such notice, the supplier shall, with the period specified in SCC and with all reasonable speed, repair or replace the defective goods or parts thereof, without costs to be purchaser.

4.15.5. If the supplier, having been notified, fails to remedy the defect(s) within the period specified in SCC, the purchaser may proceed to take such remedial action as may be necessary, at the supplier's risk and expense and without prejudice to any other rights which the purchaser may have against the supplier under the contract.

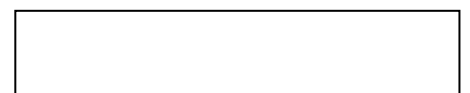
#### **4.16. Payment**

4.16.1. The method and conditions of payment to be made to the supplier under this contract shall be specified in SCC.

4.16.2. The supplier shall furnish the purchaser with an invoice accompanied by a copy of the delivery note and upon fulfillment of other obligations stipulated in the contract.

4.16.3. Payments shall be made promptly by the purchaser, but in no case later than thirty (30) days after submission of an invoice or claim by the supplier.

4.16.4. Payment will be made in Rand unless otherwise stipulated in SCC.



#### **4.17. Prices**

4.17.1. Prices charged by the supplier for goods delivered and services performed under the contract shall not vary from the prices quoted by the supplier in his bid, with the exception of any price adjustments authorized in SCC or in the purchaser's request for bid validity extension, as the case may be.

#### **4.18. Contract Amendments**

4.18.1. No variation in or modification of the terms of the contract shall be made except by written amendment signed by the parties concerned.

#### **4.19. Assignment**

4.19.1. The supplier shall not assign, in whole or in part, its obligations to perform under the contract, except with the purchaser's prior written consent.

#### **4.20. Subcontracts**

4.20.1. The supplier shall notify the purchaser in writing of all subcontracts awarded under this contract if not already specified in the bid. Such notification, in the original bid or later, shall not relieve the supplier from any liability or obligation under the contract.

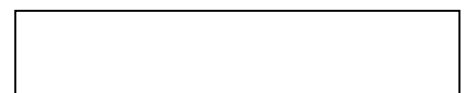
#### **4.21. Delays in the supplier's performance**

4.21.1. Delivery of the goods and performance of services shall be made by the supplier in accordance with the time schedule prescribed by the purchaser in the contract.

4.21.2. If at any time during performance of the contract, the supplier or its subcontractor(s) should encounter conditions impeding timely delivery of the goods and performance of services, the supplier shall promptly notify the purchaser in writing of the fact of the delay, its likely duration and its cause(s). As soon as practicable after receipt of the supplier's notice, the purchaser shall evaluate the situation and may at his discretion extend the supplier's time for performance, with or without the imposition of penalties, in which case the extension shall be ratified by the parties by amendment of contract.

4.21.3. No provision in a contract shall be deemed to prohibit the obtaining of supplies or services from a national department, provincial department, or local authority.

4.21.4. The right is reserved to procure outside of the contract small quantities or to have minor essential services executed if an emergency arises, the supplier's point of supply is not situated at or near the place where the supplies are required, or the supplier's services are not readily available.



4.21.5. Except as provided under GCC clause 4.25, a delay by the supplier in the performance of its delivery obligations shall procure the supplier liable to the imposition of penalties, pursuant to GCC clause 4.22, unless an extension of time is agreed upon pursuant to GCC clause 4.21.2 without the application of penalties.

4.21.6. Upon any delay beyond the delivery period in the case of a supplies contract, the purchaser shall, without cancelling the contract, be entitled to purchase supplies of a similar quality and up to the same quantity in substitution of the goods not supplied in conformity with the contract and to return any goods delivered later at the supplier's expense and risk, or to cancel the contract and buy such goods as may be required to complete the contract and without prejudice to his other rights, be entitled to claim damages from the supplier.

#### **4.22. Penalties**

4.22.1. Subject to GCC clause 4.25, if the supplier fails to deliver any or all of the goods or to perform the services within the period(s) specified in the contract, the purchaser shall, without prejudice to its other remedies under the contract, deduct from the contract price, as a penalty, a sum calculated on the delivered price of the delayed goods or unperformed services using the current prime interest rate calculated for each day of the delay until actual delivery or performance. The purchaser may also consider termination of the contract pursuant to GCC clause 4.23.

#### **4.23. Termination for default**

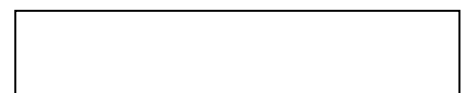
4.23.1. The purchaser, without prejudice to any other remedy for breach of contract, by written notice of default sent to the supplier, may terminate this contract in whole or in part:

- (a) if the supplier fails to deliver any or all of the goods within the period(s) specified in the contract, or within any extension thereof granted by the purchaser pursuant to GCC clause 4.21.2;
- (b) if the supplier fails to perform any other obligation(s) under the contract; or if the supplier, in the judgment of the purchaser, has engaged in corrupt or fraudulent practices in competing for or in executing the contract.

4.23.2. In the event the purchaser terminates the contract in whole or in part, the purchaser may procure, upon such terms and in such manner as it deems appropriate, goods, works or services similar to those undelivered, and the supplier shall be liable to the purchaser for any excess costs for such similar goods, works or services. However, the supplier shall continue performance of the contract to the extent not terminated.

#### **4.24. Anti-dumping and countervailing duties and rights**

4.24.1. When, after the date of bid, provisional payments are required, or anti-dumping or countervailing duties are imposed, or the amount of a provisional payment or anti-dumping or countervailing right is increased in respect of any dumped or subsidized import, the State is not liable for any amount so required or imposed, or for the amount of any such increase. When, after the said date, such a provisional payment is no longer required or any such anti-dumping or countervailing right is abolished, or where the amount of such provisional payment or any such right is reduced, any such favorable difference shall on demand be paid forthwith by the contractor



to the State may deduct such amounts from moneys (if any) which may otherwise be due to the contractor in regard to supplies or services which he delivered or procured, or is to deliver or procure in terms of the contract or any other contract or any other amount which may be due to him.

#### **4.25. Force Majeure**

4.25.1. Notwithstanding the provisions of GCC clauses 4.22 and 4.23, the supplier shall not be liable for forfeiture or its performance security, damages or termination for default if and to the extent that his delay in performance or other failure to perform his obligations under the contract is the result of an event of force majeure.

4.25.2. If a force majeure situation arises, the supplier shall promptly notify the purchaser in writing of such condition and the cause thereof. Unless otherwise directed by purchaser in writing, the supplier shall continue to perform its obligations under the contract as far as is reasonably practical and shall seek all reasonable alternative means for performance not prevented by the force majeure event.

#### **4.25. Termination for insolvency**

4.26.1. The purchaser may at any time terminate the contract by giving written notice to the supplier if the supplier becomes bankrupt or otherwise insolvent. In this event, termination will be without compensation to the supplier, provided that such termination will prejudice or affect any right of action or remedy, which has accrued or will accrue thereafter to the purchaser.

#### **4.26. Settlement of Disputes**

4.26.1. If any dispute or difference of any kind whatsoever arises between the purchaser and the supplier in connection with or arising out of the contract, the parties shall make every effort to resolve amicably such dispute or difference by mutual consultation.

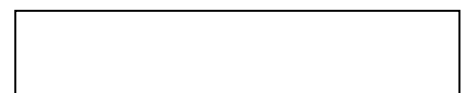
4.26.2. If, after thirty (30) days, the parties have failed to resolve their dispute or difference by mutual consultation, then either the purchaser or the supplier may give notice to the other party of his intention to commence with mediation. No mediation in respect of this matter may be commenced unless such notice is given to the other party.

4.26.3. Should it not be possible to settle a dispute by means of mediation, it may be settled in a South African court of law.

4.26.4. Mediation proceedings shall be conducted in accordance with the rules or procedure specified in the SCC.

4.26.5. Notwithstanding any reference to mediation and/or court proceedings herein,

- (a) The parties shall continue to perform their respective obligations under the contract unless they otherwise agree; and
- (b) The purchaser shall pay the supplier any monies due the supplier.



#### **4.26. Limitation of liability**

4.26.1. Except in cases of criminal negligence or willful misconduct, and in the case of infringement pursuant to clause 5.6;

- (a) the supplier shall not be liable to the purchaser, whether in contract, tort, or otherwise, for any indirect or consequential loss or damage, loss or use, loss of production, or loss of profits or interest costs, provided that this exclusion shall not apply to any obligation of the supplier to pay penalties and/or damages to the purchaser; and
- (b) the aggregate liability of the supplier to the purchaser, whether under the contract, in tort or otherwise, shall not exceed the total contract price, provided that this limitation shall not apply to the cost of repairing or replacing defective equipment.

#### **4.27. Governing language**

4.27.1. The contract shall be written in English. All correspondence and other documents pertaining to the contract that is exchanged by the parties shall also be written in English.

#### **4.28. Applicable law**

4.28.1. The contract shall be interpreted in accordance with South African laws, unless otherwise specified in SCC.

#### **4.29. Notices**

4.29.1. Every written acceptance of a bid shall be posted to the supplier concerned by registered or certified mail and any other notice to him shall be posted by ordinary mail to the address furnished in his bid or to the address notified later by him in writing and such posting shall be deemed to be proper service of such notice.

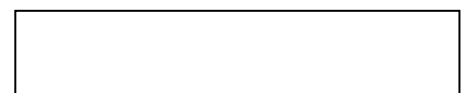
4.29.2 The time mentioned in the contract documents for performing any act after such aforesaid notice has been given, shall be reckoned from the date of posting of such notice

#### **4.30. Taxes and duties**

4.30.1.A foreign supplier shall be entirely responsible for all taxes, stamp duties, license fees, and other such levies imposed outside the purchaser's country.

4.32.2 A local supplier shall be entirely responsible for all taxes, duties, license fees, etc., incurred until delivery of the contracted goods to the purchaser.

4.32.3. No contract shall be concluded with any bidder whose tax matters are not in order. Prior to the award of a bid the Department must be in possession of a tax clearance certificate, submitted by the bidder. This certificate must be an original issued by the South African Revenue Services.



### **4.33. National Industrial Participation (NIP) Programme**

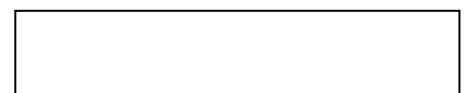
The NIP Programme administered by the Department of Trade and Industry shall be applicable to all contract that are subject to the NIP obligation

### **4.34. Prohibition of Restrictive Practices**

4.34.1. In terms of section (4) (1) (b) (iii) of the Competition Act no 89 of 1998, as amended, an agreement between, or concerned practice by, firms or a decision by an association of firms, is prohibited if it is between parties in a horizontal relationship and if a bidder(s) is / are or a contractor(s) was / were involved in collusive bidding (or bid rigging).

4.34.2. If a bidder(s) or contractor(s), based on reasonable grounds or evidence obtained by the purchaser, has / have engaged in restrictive practice referred to above, the purchaser may refer the matter to the Competition Commission for investigation and possible imposition of administrative penalties as contemplated in the Competition Act no 89 of 1998.

4.34.3. If a bidder(s) or contractor(s) has / have been found guilty by the Competition Commission of the restrictive practice referred to above, the purchaser may, in addition and without prejudice to any other remedy provided for, invalidate the bid(s) for such item(s) offered, and / or terminate the contract in whole or part, and / or restrict the bidder(s) or contractor(s) from conducting business with the public sector for a period not exceeding ten (10) years and / or claim damages from the bidder(s) or contractor(s) concerned.







## ANNEXURE A1

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**Request for Travel Management Services Proposal for  
Cross-Border Road Transport Agency  
For the period of 3 years**

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**CBRTA /HO/0059**

**Date Issued: 16<sup>th</sup> October 2020**

**Closing date and time: 06<sup>th</sup> November 2020 at 14:00**

**Bid Validity Period: 90 days**

**TENDER BOX ADDRESS:**

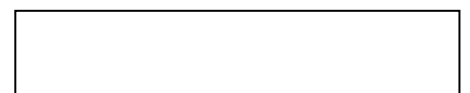
350 Witch-Hazel Avenue

Eco Point Office Park

Block A, Eco Park

Centurion

Pretoria



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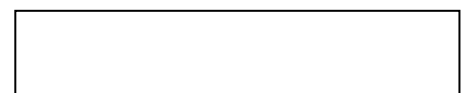
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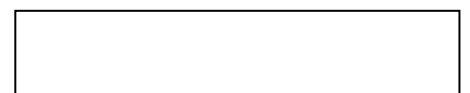
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## 1. INTRODUCTION

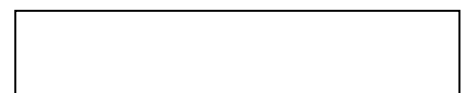
The Cross-Border Road Transport Agency (C-BRTA) was established in terms of the Cross-Border Road Transport Agency Act 4 of 1998 as amended. The mandate of the C-BRTA is to provide advice, regulation, facilitation and law enforcement in respect of cross border transport.

The C-BRTA head office is located in Centurion, Pretoria. C-BRTA is responsible for ensuring that its mandate is implemented nationally through its stakeholders nationally, regionally and internationally which requires staff travel on an ongoing basis to various destinations.

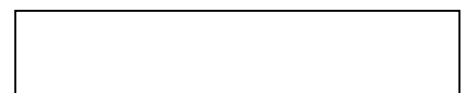
The C-BRTA invites reputable service providers to submit bids for the rendering of Travel Management Services for a period of Thirty Six (36) months. The C-BRTA's key required services are flights, accommodation, car hire, shuttle services and conferencing.

## 2. DEFINITIONS

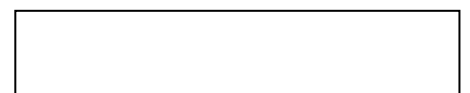
- 2.1. **Accommodation** means the rental of lodging facilities while away from one's place of abode, but on authorised official duty.
- 2.2. **After-hours service** refers to an enquiry or travel request that is actioned after normal working hours, i.e. 17h00 to 8h00 on Mondays to Fridays and twenty-four (24) hours on weekends and public holidays.
- 2.3. **Air travel** means travel by airline on authorised official business.
- 2.4. **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.
- 2.5. **Car Rental** means the rental of a vehicle for a short period of time by a traveller for official purposes.
- 2.6. **Department** means the organ of state, Department or Public Entity that requires the provision of travel management services.
- 2.7. **Domestic travel** means travel within the borders of the Republic of South Africa.
- 2.8. **Emergency service** means the booking of travel when unforeseen circumstances necessitate an unplanned trip or a diversion from original planned trip.



- 2.9. **Commerce** refers to the Government's buy-site for transversal contracts.
- 2.10. **International travel** refers to travel outside the borders of the Republic of South Africa.
- 2.11. **Lodge Card** is a credit card which is specifically designed purely for business travel expenditure. There is typically one credit card number which is "lodged" with the TMC at to which all expenditure is charged.
- 2.12. **Management Fee** is the fixed negotiated fee payable to the Travel Management Company (TMC) in monthly instalments for the delivery of travel management services, excluding any indirect service fee not included in the management fee structure (visa, refund, frequent flyer tickets etc).
- 2.13. **Merchant Fees** are fees charged by the lodge card company at the point of sale for bill back charges for ground arrangements.
- 2.14. **Quality Management System** means a collection of business processes focused on consistently meeting customer requirements and enhancing their satisfaction. It is expressed as the organizational structure, policies, procedures, processes and resources needed to implement quality management.
- 2.15. **Regional travel** means travel across the border of South Africa to any of the SADC Countries, namely; Angola, Botswana, Comoros, Democratic Republic of Congo (DRC), Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, Eswatini, United Republic of Tanzania, Zambia and Zimbabwe.
- 2.16. **Service Level Agreement (SLA)** is a contract between the TMC and C-BRTA that defines the level of service expected from the TMC.
- 2.17. **Shuttle Service** means the service offered to transfer a Traveller from one point to another, for example from place of work to the airport.
- 2.18. **Third party fees** are fees payable to third party service providers that provides travel related services on an ad hoc basis that is not directly provided by the TMC. These fees include visa fees and courier fees.
- 2.19. **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.



- 2.20. **Traveller** refers to a Government official, consultant or contractor travelling on official business on behalf of Government.
- 2.21. **Travel Authorisation** is the official form utilised by C-BRTA reflecting the detail and order number of the trip that is approved by the relevant authorising official.
- 2.22. **Travel Booker** is the person coordinating travel reservations with the Travel Management Company (TMC) consultant on behalf of the Traveller, e.g. the personal assistant of the traveller.
- 2.23. **Travel Management Company** or TMC refers to the Company contracted to provide travel management services (Travel Agents).
- 2.24. **Travel Voucher** means a document issued by the Travel Management Company to confirm the reservation and/or payment of specific travel arrangements.
- 2.25. **Value Added Services** are services that enhance or complement the general travel management services e.g. Rules and procedures of the airports.
- 2.26. **VAT** means Value Added Tax.
- 2.27. **VIP or Executive Service** means the specialised and personalised travel management services to selected employees of C-BRTA by a dedicated consultant to ensure a seamless travel experience.



### **3. PURPOSE OF THIS REQUEST FOR BIDS (RFB)**

*The purpose of this Request for Bids (RFB) is to solicit bids from potential bidder(s) for the provision of travel management services to C-BRTA.*

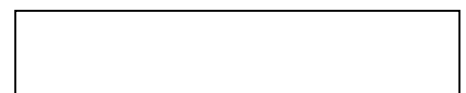
*This bids document details and incorporates, as far as possible, the tasks and responsibilities of the potential bidder required by C-BRTA for the provision of travel management services to C-BRTA.*

*This RFB does not constitute an offer to do business with C-BRTA, but merely serves as an invitation to bidder(s) to facilitate requirements-based decision process.*

### **4. LEGISLATIVE FRAMEWORK OF THE BID**

#### **4.1. Tax Legislation**

- 4.1.1. Bidder(s) must be compliant when submitting a bid to C-BRTA and remain compliant for the entire contract term with all applicable tax legislation, including but not limited to the Income Tax Act, 1962 (Act No. 58 of 1962) and Value Added Tax Act, 1991 (Act No. 89 of 1991).
- 4.1.2. It is a condition of this bid that the tax matters of the successful bidder be in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.
- 4.1.3. The Tax Compliance status requirements are also applicable to foreign bidders / individuals who wish to submit bids.
- 4.1.4. It is a requirement that bidders grant a written confirmation when submitting this bid that SARS may on an ongoing basis during the tenure of the contract disclose the bidder's tax compliance status and by submitting this bid such confirmation is deemed to have been granted.
- 4.1.5. Bidders are required to be registered on the Central Supplier Database (CSD) and the National Treasury shall verify the bidder's tax compliance status through the Central Supplier Database.
- 4.1.6. Where Consortia / Joint Ventures / Sub-contractors are involved, each party must be registered on the Central Supplier Database and their tax compliance status will be verified through the Central Supplier Database.





#### 4.2. Procurement Legislation

C-BRTA has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act, No. 1 of 1999), the Preferential Procurement Policy Framework Act 2000 (Act, No.5 of 2000) and the Broad-Based Black Economic Empowerment Act, 2003 (Act, No. 53 of 2003).

#### 4.3. Technical Legislation and/or Standards

Bidder(s) should be cognisant of the legislation and/or standards specifically applicable to the services.

### 5. BRIEFING SESSION

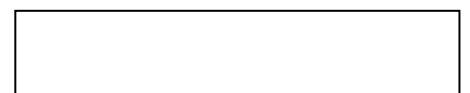
A **compulsory briefing** and clarification session will be held at 350 Witch-Hazel Avenue, Eco Point Office Park, Block A, Eco Park, Centurion, Pretoria, on the 23<sup>rd</sup> October 2020 at 11:h00 to clarify to bidder(s) the scope and extent of work to be executed. Failure to attend the briefing session will lead to disqualification.

**It is Mandatory for bidders attend the briefing session.**

### 6. TIMELINE OF THE BID PROCESS

The period of validity of tender , after the closing date is 90 (Ninety) days. The project timeframes of this bid are set out below:

Activity	Due Date
Advertisement of bid on Government e-tender portal / print media / Tender Bulletin	16 <sup>th</sup> October 2020
Compulsory briefing and clarification session	23 <sup>rd</sup> October 2020
Questions relating to bid from bidder(s)	26 <sup>th</sup> October 2020
Bid closing date	06 <sup>th</sup> November 2020



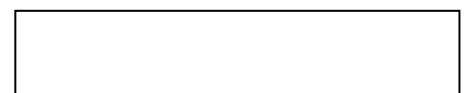
Notice to bidder(s)	C-BRTA will endeavour to inform bidders of the progress until conclusion of the tender.
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All dates and times in this bid are South African standard time.

Any time or date in this bid is subject to change at C-BRTA's discretion. The establishment of a time or date in this bid does not create an obligation on the part of C-BRTA to take any action, or create any right in any way for any bidder to demand that any action be taken on the date established. The bidder accepts that, if C-BRTA extends the deadline for bid submission (the Closing Date) for any reason, the requirements of this bid otherwise apply equally to the extended deadline.

## 7. CONTACT AND COMMUNICATION

- 7.1. A nominated official of the bidder(s) can make enquiries in writing, to the specified person, Morwamoche Sekhukhune via email morwamoche.sekhukhune@cbrta.co.za and/or 012 471 2000.
- 7.2. The delegated official of C-BRTA may communicate with Bidder(s) where clarity is sought in the bid proposal.
- 7.3. Any communication to an official or a person acting in an advisory capacity for C-BRTA in respect of the bid between the closing date and the award of the bid by the Bidder(s) is discouraged.
- 7.4. All communication between the Bidder(s) and C-BRTA must be done in writing.
- 7.5. Whilst all due care has been taken in connection with the preparation of this bid, C-BRTA makes no representations or warranties that the content of the bid or any information communicated to or provided to Bidder(s) during the bidding process is, or will be, accurate, current or complete. C-BRTA and its employees and advisors will not be liable with respect to any information communicated which may not be accurate, current or complete.
- 7.6. If Bidder(s) finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by C-BRTA



(other than minor clerical matters), the Bidder(s) must promptly notify C-BRTA in writing of such discrepancy, ambiguity, error or inconsistency in order to afford C-BRTA an opportunity to consider what corrective action is necessary (if any).

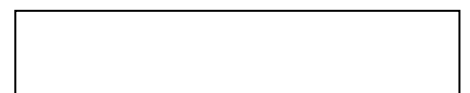
- 7.7. Any actual discrepancy, ambiguity, error or inconsistency in the bid or any other information provided by C-BRTA will, if possible, be corrected and provided to all Bidder(s) without attribution to the Bidder(s) who provided the written notice.
- 7.8. All persons (including Bidder(s)) obtaining or receiving the bid and any other information in connection with the Bid or the Tendering process must keep the contents of the Bid and other such information confidential, and not disclose or use the information except as required for the purpose of developing a proposal in response to this Bid.

## **8. LATE BIDS**

Bids received after the closing date and time, at the address indicated in the bid documents, will not be accepted for consideration and where practicable, be returned unopened to the Bidder(s).

## **9. COUNTER CONDITIONS**

Bidders' attention is drawn to the fact that amendments to any of the Bid Conditions or setting of counter conditions by Bidders or qualifying any Bid Conditions will result in the invalidation of such bids.

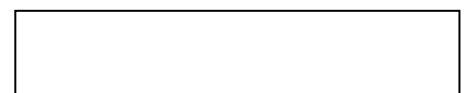


## **10. FRONTING**

- 10.1. C-BRTA supports the spirit of broad based black economic empowerment and recognizes that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background C-BRTA condemns any form of fronting.
- 10.2. The C-BRTA, in ensuring that Bidders conduct themselves in an honest manner will, as part of the bid evaluation processes, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representation made in bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry, be established during such enquiry / investigation, the onus will be on the Bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the bid / contract and may also result in the restriction of the Bidder /contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies C-BRTA may have against the Bidder / contractor concerned.

## **11. SUPPLIER DUE DILIGENCE**

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



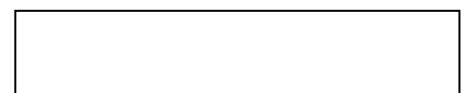
**12. SUBMISSION OF BIDS**

12.1. Bid documents may either be posted to [350 Witch Hazel Avenue, Eco Point Office Park, Block A, Eco Park, Centurion] OR placed in the tender box OR couriered to the aforesaid address on or before the closing date and time.

12.2. Bid documents will only be considered if received by C-BRTA before the closing date and time, regardless of the method used to send or deliver such documents to C-BRTA.

12.3. The bidder(s) are required to submit three (3) copies of the file and one (1) original.

<b>FILE 1 (TECHNICAL FILE)</b>	<b>FILE 2 (PRICE &amp; BBBEE)</b>
<p><b>Exhibit 1:</b> Pre-qualification documents <i>(Refer to Section 17.1 - Gate 0: Pre-qualification Criteria (Table 1)).</i></p>	<p><b>Exhibit 1:</b> Pricing Schedule <i>(Refer to Section 16 – Pricing Model and Annexure A3 – Pricing Submission).</i></p>
<p><b>Exhibit 2:</b></p> <ul style="list-style-type: none"> <li>• Technical Responses and Bidder Compliance Checklist for Technical Evaluation.</li> <li>• Supporting documents for technical responses. <i>(Refer to Section 17.2 - Gate 1: Technical Evaluation Criteria and Annexure A2 – Desktop Evaluation Technical Scorecard and Compliance Checklist).</i></li> </ul>	
<p><b>Exhibit 3:</b></p> <ul style="list-style-type: none"> <li>• General Conditions of Contract (GCC).</li> <li>• Draft Service Level Agreement <i>(Refer to Section 20 – Service Level Agreement.)</i></li> </ul>	



<b>Exhibit 4:</b>	
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- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>• Company Profile.</li><li>• Any other supplementary information.</li></ul> |  |
|---|--|

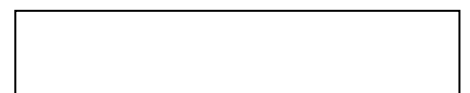
12.4. Bidders are requested to initial each page of the tender document on the bottom right hand corner.

### **13. PRESENTATION / DEMONSTRATION**

C-BRTA reserves the right to request presentations/demonstrations from the short-listed Bidders as part of the bid evaluation process.

### **14. DURATION OF THE CONTRACT**

The successful bidder will be appointed for a period of 36 (thirty six) months with an option to renew in C-BRTA's sole discretion for an additional 36 (thirty six) months on the same terms and conditions unless the parties agree otherwise. The renewal of the contract will be at intervals of 12 (twelve) months each. (Contract subject to review in intervals of 12 months)



## 15. SCOPE OF WORK

### 15.1. Background

The Cross-Border Road Transport Agency (C-BRTA) exists to improve the cross-border flow of commuters and freight operators who make use of road transport.

Its function as an interstate operations agency is to reduce mobility constraints for road transport operators, in the form of regulating market access and issuing cross-border permits, while facilitating sustainable social and economic development in the Southern African Development Community (SADC) region.

Our legislative mandate includes the following:

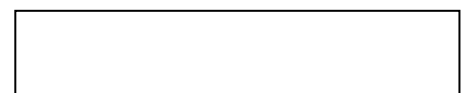
- To improve the unimpeded flow of freight and commuters across the SADC region
- To introduce regulated competition in respect of cross-border passenger road transport
- To reduce operational constraints for the cross-border road transport industry as a whole
- To maximise business opportunities and liberalise market access in respect of cross-border road freight transport
- To empower the cross-border road transport industry by improving the safety, security, reliability, quality and efficiency of services

C-BRTA Strategic objectives includes to:

- Improve institutional performance and governance
- Improve non-financial performance reporting
- Increase participation in border operations
- Develop cross-border industry partnerships
- Build entrepreneurship and capacity for SMMEs in the transport sector
- Roll out an Industry Partnership Development Plan
- Improve client relationship management and implement a client feedback mechanism for all services
- Harmonise standards and procedures
- Improve operator compliance
- Review the C-BRTA mandate

C-BRTA's primary objective in issuing this RFB is to enter into agreement with a successful bidder(s) who will achieve the following:

- a) Provide C-BRTA 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;



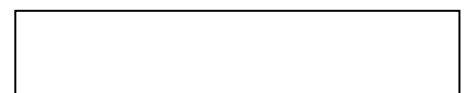
- b) Achieve significant cost savings for C-BRTA without any degradation in the services;
- c) Appropriately contain C-BRTA’s risk and traveller risk.

**15.2. Travel Volumes**

The current C-BRTA total volumes per annum include air travel, accommodation, car hire, forex, conference, etc. The table below details the number of transactions for the FY 2019/2020 as follows:

<b>Service Category</b>	<b>Projection Information on Number of Transaction per annum</b>
Air travel – Domestic	134
Air Travel - Regional & International	55
Car Rental – Domestic	153
Car Rental - Regional & International	34
Accommodation – Domestic	365
Accommodation - Regional & International	93
Transfers – Domestic	45
Transfers - Regional & International	38
Bus/Coach bookings	2
Train - Regional & International	0
Conferences/Events	13
After Hours	24
International Insurance	40
<b>GRAND TOTAL</b>	<b>996</b>

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





### 15.3. Service Requirements

#### 15.3.1. General

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

- a. The travel services will be provided to all Travellers travelling on behalf of [C-BRTA], locally and internationally. This will include employees and contractors, consultants and clients where the agreement is that C-BRTA is responsible for the arrangement and cost of travel.
- b. Provide travel management services during normal office hours (Monday to Friday 8h00 – 17h00) and provide after hours and emergency services as stipulated in paragraph 15.3.6.
- c. Familiarisation with current C-BRTA travel business processes.
- d. Familiarisation with current travel suppliers and negotiated agreements that are in place between C-BRTA and third parties. Assist with further negotiations for better deals with travel service providers.
- e. Familiarisation with current C-BRTA 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. Provide a facility for C-BRTA to update their travellers' profiles.
- h. Manage the third party service providers by addressing service failures and complaints against these service providers.
- i. Consolidate all invoices from travel suppliers.
- j. Provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition.
- k. Provide the reference letters from at least three (3) contactable existing/recent clients (within past 3 years) which are of a similar size to C-BRTA.

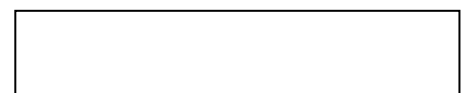


- I. It will be an added advantage if the bidder is a member of ASATA (Association of South African Travel Agents). Proof of such membership must be submitted with the bid at closing date and time.

### 15.3.2. **General Rules for Reservations**

The Travel Management Company shall:

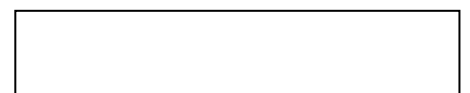
- a. Receive travel requests from travellers and/or travel bookers, respond with quotations (confirmations) and availability. Upon the receipt of the relevant approval, the travel agent will issue the required e-tickets and vouchers immediately and send it to the travel booker and traveller via the agreed communication medium.
- b. Always endeavour to make the most cost effective travel arrangements based on the request from the traveller and/or travel booker.
- c. Apprise themselves of all travel requirements for destinations to which travellers will be travelling and advise the Traveller of alternative plans that are more cost effective and more convenient where necessary.
- d. Obtain a minimum of three (3) price comparisons for all travel requests where the routing or destination permits.
- e. Book the negotiated discounted fares and rates where possible.
- f. Shall keep abreast of carrier schedule changes as well as all other alterations and new conditions affecting travel and make appropriate adjustments for any changes in flight schedules prior to or during the traveller's official trip. When necessary, e-tickets and billing shall be modified and reissued to reflect these changes.
- g. Book parking facilities at the airports where required for the duration of the travel.
- h. Respond timely and process all queries, requests, changes and cancellations timeously and accurately.
- i. Shall be able to facilitate group bookings (e.g. for meetings, conferences, events, etc.)



- j. Shall issue all necessary travel documents, itineraries and vouchers timeously to traveller(s) prior to departure dates and times.
- k. Advise the Traveller of all visa and inoculation requirements well in advance.
- l. Assist with the arrangement of foreign currency and the issuing of travel insurance for international trips where required.
- m. Facilitate 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. 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. TMC should advise where a visa is required for travelling.
- p. Negotiated airline fares, accommodation establishment rates, car rental rates, etc. that are negotiated directly or established by National Treasury or by C-BRTA are **non-commissionable**, where commissions are earned for bookings all these commissions should be returned to C-BRTA on a quarterly basis.
- q. Ensure confidentiality in respect of all travel arrangements and concerning all persons requested by C-BRTA.
- r. Timeous submission of proof that services have been satisfactorily delivered (invoices) as per C-BRTA's instructions

### 15.3.3. **Air Travel**

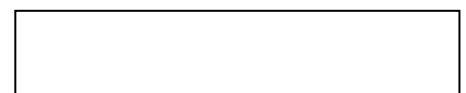
- a. The TMC must be able to book full service carriers as well as low cost carriers.
- b. The TMC will book the most cost effective airfares possible for domestic travel.
- c. For international flights, the airline which provides the most cost effective and practical routings may be used.
- d. The TMC should obtain three or more price comparisons where applicable to present the most cost effective and practical routing to the Traveller.



- e. The airline ticket should include the applicable airline agreement number as well as the individual loyalty program number of the Traveller (if applicable).
- f. Airline tickets must be delivered electronically (SMS and/or email format) to the traveller(s) and travel bookers promptly after booking before the departure times.
- g. The TMC will also assist with the booking of charters for VIPs utilising the existing transversal term contract where applicable as well as the sourcing of alternative service providers for other charter requirements.
- h. The TMC will be responsible for the tracking and management of unused e-tickets as per agreement with the institution and provide a report on refund management once a quarter.
- i. The TMC must during their report period provide proof that bookings were made against the discounted rates on the published fairs where applicable.
- j. Ensure that travellers are always informed of any travel news regarding airlines (like baggage policies, checking in arrangements, etc.)
- k. Assist with lounge access if and when required.

#### 15.3.4. **Accommodation**

- a. The TMC will obtain price comparisons within the maximum allowable rate matrix as per the cost containment instruction of the National Treasury.
- b. The TMC will obtain three price comparisons from accommodation establishments that provide the best available rate within the maximum allowable rate and that is located as close as possible to the venue or office or location or destination of the traveller
- c. This includes planning, booking, confirming and amending of accommodation with any establishment (hotel group, private hotel, guest house or Bed & Breakfast) in accordance with C-BRTA's travel policy.
- d. C-BRTA travellers may only stay at accommodation establishments with which C-BRTA has negotiated corporate rates. Should there be no rate agreement in place in the destination, or should the contracted establishment be unable to accommodate the traveller, the TMC will source suitable accommodation

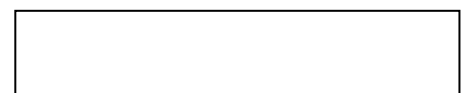


bearing in mind the requirement of convenience for the traveller and conformation with acceptable costs, or as stipulated in written directives issued from time to time by the National treasury or C-BRTA.

- e. Accommodation vouchers must be issued to all C-BRTA travellers for accommodation bookings and must be invoiced to C-BRTA as per arrangement. Such invoices must be supported by a copy of the original hotel accommodation charges.
- f. The TMC must during their report period provide proof, where applicable, that accommodation rates were booked within the maximum allowable rates as per the cost containment instruction of the National Treasury.
- g. Cancellation of accommodation bookings must be done promptly to guard against no show and late cancellation fees.

#### 15.3.5. **Car Rental and Shuttle Services**

- a. The TMC will book the approved category vehicle in accordance with the C-BRTA Travel Policy with the appointed car rental service provider from the closest rental location (airport, hotel and venue).
- b. The travel consultant should advise the Traveller on the best time and location for collection and return considering the Traveller's specific requirements.
- c. The TMC must ensure that relevant information is shared with travellers regarding rental vehicles, like e-tolls, refuelling, keys, rental agreements, damages and accidents, etc.
- d. 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 C-BRTA Travel Policy with the appointed and/or alternative service providers. Transfers can also include bus and coach services.
- f. The TMC should manage shuttle companies on behalf of the C-BRTA 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.

#### 15.3.6. **After Hours and Emergency Services**

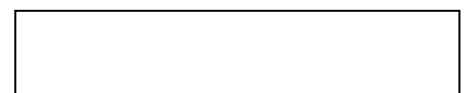
- a. The TMC must provide a consultant or team of consultants to assist Travellers with after hours and emergency reservations and changes to travel plans.
- b. A dedicated consultant/s must be available to assist VIP/Executive Travellers with after hour or emergency assistance.
- c. After hours' services 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 call centre facility or after hours contact number should be available to all travellers so that when required, unexpected changes to travel plans can be made and emergency bookings attended to.
- e. The Travel Management Company must have a standard operating procedure for managing after hours and emergency services. This must include purchase order generation of the request within 24 hours.

#### 15.4. **Communication**

- 15.4.1. The TMC may be requested to conduct workshops and training sessions for Travel Bookers of C-BRTA.
- 15.4.2. All enquiries must be investigated and prompt feedback be provided in accordance with the Service Level Agreement.
- 15.4.3. The TMC must ensure sound communication with all stakeholders. Link the business traveller, travel coordinator, travel Management Company in one smooth continuous workflow.

#### 15.5. **Financial Management**

- 15.5.1. The TMC must implement the rates negotiated by C-BRTA with travel service providers or the discounted air fares, or the maximum allowable rates established by the National Treasury where applicable.



- 15.5.2. The TMC will be responsible to manage the service provider accounts. This will include the timely receipt of invoices to be presented to C-BRTA for payment within the agreed time period.
- 15.5.3. Enable savings on total annual travel expenditure and this must be reported and proof provided during monthly and quarterly reviews.
- 15.5.4. The TMC will be required to offer a 30 day bill-back account facility to institutions should a lodge card not be offered. 'Bill back', refers to the supplier sending the bill back to the TMC, who, in turn, invoices C-BRTA for the services rendered.
- 15.5.5. Where pre-payments are required for smaller Bed & Breakfast /Guest House facilities, these will be processed by the TMC. These are occasionally required at short notice and even for same day bookings.
- 15.5.6. Consolidate Travel Supplier bill-back invoices.
- 15.5.7. The TMC is responsible for the consolidation of invoices and supporting documentation to be provided to C-BRTA'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.
- 15.5.8. Ensure Travel Supplier accounts are settled timeously.

## 15.6. **Technology, Management Information and Reporting**

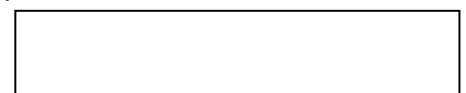
- 15.6.1. The TMC must have the capability to consolidate all management information related to travel expenses into a single source document with automated reporting tools.
- 15.6.2. The implementation of an Online Booking Tool to facilitate domestic bookings should be considered to optimise the services and related fees.
- 15.6.3. All management information and data input must be accurate.
- 15.6.4. The TMC will be required to provide the C-BRTA with a minimum of three (3) standard monthly reports that are in line with the National Treasury's Cost Containment Instructions reporting template requirements at no cost.



The reporting templates can be found on

<http://www.treasury.gov.za/legislation/pfma/TreasuryInstruction/AccountantGeneral.aspx>

- 15.6.5. Reports must be accurate and be provided as per C-BRTA's specific requirements at the agreed time. Information must be available on a transactional level that reflect detail including the name of the traveller, date of travel, spend category (example air travel, shuttle, accommodation).
- 15.6.6. C-BRTA may request the TMC to provide additional management reports.
- 15.6.7. Reports must be available in an electronic format for example Microsoft Excel.
- 15.6.8. Service Level Agreements reports must be provided on the agreed date. It will include but will not be limited to the following:
  - i. Travel
    - a) After hours' Report;
    - b) Compliments and complaints;
    - c) Consultant Productivity Report;
    - d) Long term accommodation and car rental;
    - e) Extension of business travel to include leisure;
    - f) Upgrade of class of travel (air, accommodation and ground transportation);
    - g) Bookings outside Travel Policy.
  - ii. Finance
    - a) Reconciliation of commissions/rebates or any volume driven incentives;
    - b) Creditor's ageing report;
    - c) Creditor's summary payments;
    - d) Daily invoices;
    - e) Reconciled reports for Travel Lodge card statement;
    - f) No show report;
    - g) Cancellation report;
    - h) Receipt delivery report;
    - i) Monthly Bank Settlement Plan (BSP) Report;





- j) Refund Log;
- k) Open voucher report, and
- l) Open Age Invoice Analysis.

15.6.9. The TMC will implement all the necessary processes and programs to ensure that all the data is secure at all times and not accessible by any unauthorised parties.

### 15.7. Account Management

15.7.1. An Account Management structure should be put in place to respond to the needs and requirements of the C-BRTA and act as a liaison for handling all matters with regard to delivery of services in terms of the contract.

15.7.2. The TMC must appoint a dedicated Account or Business Manager that is ultimately responsible for the management of the C-BRTA's account.

15.7.3. The necessary processes should be implemented to ensure good quality management and ensuring Traveller satisfaction at all times.

15.7.4. A complaint handling procedure must be implemented to manage and record the compliments and complaints of the TMC and other travel service providers.

15.7.5. Ensure that the C-BRTA's Travel Policy is enforced.

15.7.6. The Service Level Agreement (SLA) must be managed and customer satisfaction surveys conducted to measure the performance of the TMC.

15.7.7. Ensure that workshops/training is provided to Travellers and/or Travel Bookers

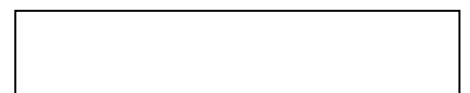
15.7.8. During reviews, comprehensive reports on the travel spend and the performance in terms of the SLA must be presented.

### 15.8. Value Added Services

The TMC must provide the following value added services:

15.8.1. Destination information for regional and international destinations:

- i. Health warnings;
- ii. Weather forecasts;
- iii. Places of interest;



- iv. Visa information;
- v. Travel alerts;
- vi. Location of hotels and restaurants;
- vii. Information including the cost of public transport;
- viii. Rules and procedures of the airports;
- ix. Business etiquette specific to the country;
- x. Airline baggage policy; and
- xi. Supplier updates

15.8.2. Electronic voucher retrieval via web and smart phones;

15.8.3. SMS notifications for travel confirmations;

15.8.4. Travel audits;

15.8.5. Global Travel Risk Management;

15.8.6. VIP services for Executives that include, but is not limited to check-in support.

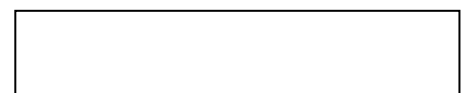
#### **15.9. Cost Management**

15.9.1. The National Treasury cost containment initiative and the C-BRTA's Travel Policy is establishing a basis for a cost savings culture.

15.9.2. It is the obligation of the TMC Consultant to advise on the most cost effective option at all times, and costs should be within the framework of the National Treasury's cost containment instructions.

15.9.3. The TMC plays a pivotal role to provide high quality travel related services that are designed to strike a balance between effective cost management, flexibility and traveller satisfaction.

15.9.4. The TMC should have in-depth knowledge of the relevant supplier(s)' products, to be able to provide the best option and alternatives that are in accordance with C-BRTA'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.



## 15.10. Quarterly and Annual Travel Reviews

15.10.1. Quarterly reviews are required to be presented by the Travel Management Company on all C-BRTA travel activity in the previous three-month period. These reviews are comprehensive and presented to C-BRTA's Procurement and Finance teams as part of the performance management reviews based on the service levels.

15.10.2. Annual Reviews are also required to be presented to C-BRTA's Executives.

15.10.3. These Travel Reviews will include without limitation the following information:

- i. Implementation of cost containment measures.
- ii. Compliance with the Service Level Agreement.

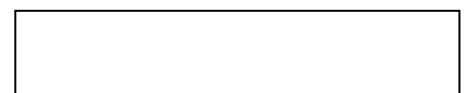
## 15.11. Office Management

15.11.1. The TMC to ensure high quality service to be delivered at all times to the C-BRTA's travellers. The TMC is required to provide C-BRTA with highly skilled and qualified human resources of the following roles but not limited to:

- a. Senior Consultants;
- b. Intermediate Consultants;
- c. Junior Consultants;
- d. Travel Manager (Operational);
- e. Finance Manager / Branch Accountant;
- f. Admin Back Office (Creditors / Debtors/Finance Processors);
- g. Strategic Account Manager (per hour); and
- h. System Administrator (General Admin).

## 16. PRICING MODEL

C-BRTA requires bidders to propose two pricing models being the transactional fee model and the management fee model. C-BRTA will at their discretion select the best possible cost effective solution.



## 16.1. Transaction Fees

### Refer Annexure A3: Pricing Schedule

16.1.1. The transaction fee must be a fixed amount per service. 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.

i. Off-site option **(Template 2)**

16.1.2. The Bidder must further indicate the estimated percentage split between Traditional booking and On-line bookings.

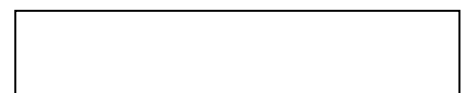
### Volume driven incentives

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

- i. National Treasury has negotiated non-commissionable fares and rates with various airlines carriers and other service providers;
- ii. No override commissions earned through C-BRTA reservations will be paid to the TMCs;
- iii. An open book policy will apply and any commissions earned through the C-BRTA volumes will be reimbursed to C-BRTA.
- iv. TMCs are to book these negotiated rates or the best fare available, whichever is the most cost effective for the institution.

## 17. EVALUATION AND SELECTION CRITERIA

C-BRTA has set minimum standards (Gates) that a bidder needs to meet in order to be evaluated and selected as a successful bidder. The minimum standards consist of the following:



Pre-qualification Criteria (Gate 0)	Technical Evaluation Criteria and Presentation (Gate 1 ) (A+B)	Price and B-BBEE Evaluation (Gate 2)
Bidders must submit all documents as outlined in paragraph 17.1 (Table 1) below. Only bidders that comply with ALL these criteria will proceed to Gate 1.	Bidder(s) are required to achieve a minimum of 70 points on presentation out of 100 points to proceed to Gate 2 (Price and BEE).	Bidder(s) will be evaluated out of 100 points and Gate 2 will only apply to bidder(s) who have met and exceeded the threshold of 70 points.

### 17.1. Gate 0: Pre-qualification Criteria

Without limiting the generality of C-BRTA's other critical requirements for this Bid, bidder(s) must submit the documents listed in **Table 1** below. 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 administration and mandatory bid requirements. The bidder(s) proposal may be disqualified for non-submission of any of the documents.

**Table 1: Documents that must be submitted for Pre-qualification**

Document that must be submitted	Non-submission may result in disqualification?	
Invitation to Bid – SBD 1	YES	Complete and sign the supplied pro forma document.
Tax Status Tax Clearance Certificate – SBD 2	YES	<ul style="list-style-type: none"> <li>i. Written confirmation that SARS may on an on going basis during the tenure of the contract disclose the bidder's tax compliance status. (Refer Section 4.1.4).</li> <li>ii. Proof of Registration on the Central Supplier Database (Refer Section 4.1.5)</li> <li>iii. Vendor number.</li> <li>iv. In the event where the Bidder submits a hard copy of the Tax</li> </ul>



		Clearance Certificate, the CSD verification outcome will take precedence.
<b>Declaration of Interest – SBD 4</b>	<b>YES</b>	Complete and sign the supplied pro forma document.
<b>Preference Point Claim Form – SBD 6.1</b>	<b>NO</b>	Non-submission will lead to a zero (0) score on BBBEE.
<b>Declaration of Bidder’s Past Supply Chain Management Practices – SBD 8</b>	<b>YES</b>	Complete and sign the supplied pro forma document.
<b>Certificate of Independent Bid Determination – SBD 9</b>	<b>YES</b>	Complete and sign the supplied pro forma document.
<b>Bidder Compliance form for Functional Evaluation</b>	<b>YES</b>	Complete and sign.
<b>Registration on Central Supplier Database (CSD)</b>	<b>NO</b>	The Travel Management Company (TMC) must be registered as a service provider on the Central Supplier Database (CSD). If you are not registered proceed to complete the registration of your company prior to submitting your proposal. Visit <a href="https://secure.csd.gov.za/">https://secure.csd.gov.za/</a> to obtain your vendor number. Submit proof of registration.
<b>IATA Licence / Certificate</b>	<b>YES</b>	<ul style="list-style-type: none"> <li>i. Bidders are required to submit their International Air Transport Association (IATA) licence/certificate (certified copy) at closing date.</li> <li>ii. Where a bidding company is using a 3rd party IATA licence, proof of the agreement must be attached and copy of the certificate to that effect at closing date.</li> </ul>



<b>Pricing Schedule</b>	<b>YES</b>	Submit full details of the pricing proposal as per <b>Annexure A3 in a separate envelope.</b>
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**17.2. Gate 1: Technical Evaluation Criteria = 100 points**

All bidders are required to respond to the technical evaluation criteria scorecard and compliance checklist. Refer to **Annexure A2** for detailed information.

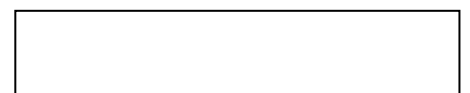
Only Bidders that have met the Pre-Qualification Criteria in (Gate 0) will be evaluated in Gate 1 for functionality. Functionality will be evaluated as follows:

- i. Desktop Technical Evaluation – Bidders will be evaluated out of 70 points and are required to achieve minimum threshold of 70 points of 100 points.
- ii. Presentation and system demonstration – Bidders will be evaluated out of 100 points and are required to achieve minimum threshold of 70 points out of 100 points.
- iii. The overall score must be above 70 points on presentation in order to proceed to Gate 2 for Price and BBBEE evaluations.

As part of due diligence, C-BRTA will conduct a site visit at a client of the Bidder (reference) for validation of the services rendered. The choice of site will be at C-BRTA’s sole discretion.

The Bidder’s information will be scored according to the following points system:

<b>Functionality</b>	<b>Maximum Points Achievable</b>	<b>Minimum Threshold</b>
Desktop Technical Evaluation Details found in Annexure A2 – Technical Scorecard	100	70
Presentation and On-site Reference Checks (Gate 1B)	100	70



**17.3. Gate 2: Price and BBEE Evaluation (80+20) = 100 points**

Only Bidders that have met the 70 points threshold in Gate 1(B) on presentation will be evaluated in Gate 2 for price and BBEE. Price and BBEE will be evaluated as follows:

“The Agency determined, in terms of Regulation 3 of the PPPFA, that pre-qualification criteria to advance certain designated groups will not be applicable to this tender.” Only Bidders that have met the 70 points threshold in Gate 1(B) will be evaluated in Gate 2 for price and BBEE. Price and BBEE will be evaluated as follows:

In terms of regulation 6 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be adjudicated on the 90/10-preference point system in terms of which points are awarded to bidders on the basis of:

- The bid price (maximum 80 points).
- B-BBEE status level of contributor (maximum 20points).

**i. Stage 1 – Price Evaluation (80 Points)**

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

The

following formula will be used to calculate the points for price:

Where

$P_s$  = Points scored for comparative price of bid under consideration

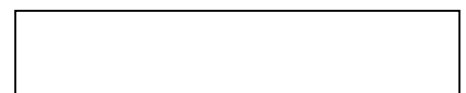
$P_t$  = Comparative price of bid under consideration

$P_{\min}$  = Comparative price of lowest acceptable bid

**ii. Stage 2 – BBEE Evaluation (20 Points)**

**a. BBEE Points allocation**

A maximum of 20 points may be allocated to a bidder for attaining their B-BBEE status level of contributor in accordance with the table below:





<b>B-BBEE Status Level of Contributor</b>	<b>Number of Points</b>
1	20
2	18
3	14
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

B-BBEE points may be allocated to bidders on submission of the following documentation or evidence:

- A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1); and
- B-BBEE Certificate.

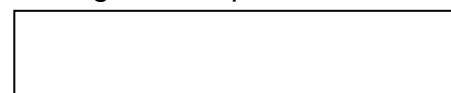
**b. Joint Ventures, Consortiums and Trusts**

A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A trust, consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Bidders must submit concrete proof of the existence of joint ventures and/or consortium arrangements. C-BRTA 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.

**c. Sub-contracting**

Bidders/ tenderers 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.

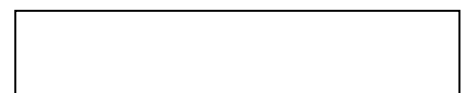
The following is an extract from the PPPFA Act:

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 EME that has the capability and ability to execute the sub-contract.”

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.”

iii. **Stage 3 (80 + 20 = 100 points)**

The Price and BBBEE points will be consolidated.



**18. GENERAL CONDITIONS OF CONTRACT**

Any award made to a bidder(s) under this bid is conditional, amongst others, upon –

- a. The bidder(s) accepting the terms and conditions contained in the General Conditions of Contract as the minimum terms and conditions upon which C-BRTA is prepared to enter into a contract with the successful Bidder(s).
- b. The bidder submitting the General Conditions of Contract to C-BRTA together with its bid, duly signed by an authorised representative of the bidder.

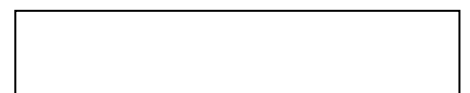
**19. CONTRACT PRICE ADJUSTMENT**

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

STATS SA P0141 (CPI), Table E	Table E - All Items
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**20. SERVICE LEVEL AGREEMENT**

- 20.1. Upon award C-BRTA and the successful bidder will conclude a Service Level Agreement regulating the specific terms and conditions applicable to the services being procured by C-BRTA, more or less in the format of the draft Service Level Indicators included in this tender pack.
- 20.2. C-BRTA reserves the right to vary the proposed draft Service Level Indicators during the course of negotiations with a bidder by amending or adding thereto.
- 20.3. Bidder(s) are requested to:
  - a. Comment on draft Service Level Indicators and where necessary, make proposals to the indicators;
  - b. Explain each comment and/or amendment; and
  - c. Use an easily identifiable colour font or “track changes” for all changes and/or amendments to the Service Level Indicators for ease of reference.



20.4. C-BRTA reserves the right to accept or reject any or all amendments or additions proposed by a bidder if such amendments or additions are unacceptable to C-BRTA or pose a risk to the organisation.

## **21. SPECIAL CONDITIONS OF THIS BID**

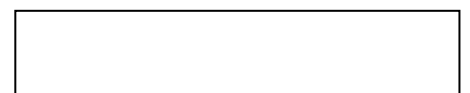
C-BRTA reserves the right:

- 21.1. To award this tender to a bidder that did not score the highest total number of points, only in accordance with section 2(1)(f) of the PPPFA (Act 5 of 2000).
- 21.2. To negotiate with one or more preferred bidder(s) identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other bidder(s) who has not been awarded the status of the preferred bidder(s).
- 21.3. To accept part of a tender rather than the whole tender.
- 21.4. To carry out site inspections, product evaluations or explanatory meetings in order to verify the nature and quality of the services offered by the bidder(s), whether before or after adjudication of the Bid.
- 21.5. To correct any mistakes at any stage of the tender that may have been in the Bid documents or occurred at any stage of the tender process.
- 21.6. To cancel and/or terminate the tender process at any stage, including after the Closing Date and/or after presentations have been made, and/or after tenders have been evaluated and/or after the preferred bidder(s) have been notified of their status as such.
- 21.7. Award to multiple bidders based either on size or geographic considerations.

## **22. C-BRTA REQUIRES BIDDER(S) TO DECLARE**

In the Bidder's Technical response, bidder(s) are required to declare the following:

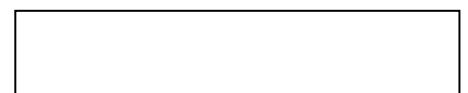
- 22.1. Confirm that the bidder(s) is to: –



- a. Act honestly, fairly, and with due skill, care and diligence, in the interests of C-BRTA;
- b. Have and employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- c. Act with circumspection and treat C-BRTA fairly in a situation of conflicting interests;
- d. Comply with all applicable statutory or common law requirements applicable to the conduct of business;
- e. Make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with C-BRTA;
- f. Avoidance of fraudulent and misleading advertising, canvassing and marketing;
- g. To conduct their business activities with transparency and consistently uphold the interests and needs of C-BRTA as a client before any other consideration; and
- h. To ensure that any information acquired by the bidder(s) from C-BRTA will not be used or disclosed unless the written consent of the client has been obtained to do so.

## **23. CONFLICT OF INTEREST, CORRUPTION AND FRAUD**

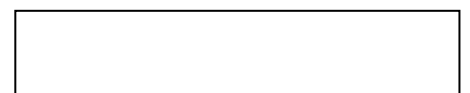
23.1. C-BRTA reserves its right to disqualify any bidder who either itself or any of whose members (save for such members who hold a minority interest in the bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of C-BRTA or any other government organ or entity and whether from the Republic of South Africa or otherwise ("Government Entity")



- a. Engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this bid;
- b. Seeks any assistance, other than assistance officially provided by a C-BRTA, from any employee, advisor or other representative of a C-BRTA in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a C-BRTA;
- c. Makes or offers any gift, gratuity, anything of value or other inducement, whether lawful or unlawful, to any of C-BRTA's officers, directors, employees, advisors or other representatives;
- d. Accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a C-BRTA;
- e. Pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, that is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a C-BRTA;
- f. Has in the past engaged in any matter referred to above; or
- g. Has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such bidder, member or director's name not specifically appearing on the List of Tender Defaulters kept at National Treasury.

**24. MISREPRESENTATION DURING THE LIFECYCLE OF THE CONTRACT**

24.1. The bidder should note that the terms of its Tender will be incorporated in the proposed contract by reference and that C-BRTA relies upon the bidder's Tender as a material representation in making an award to a successful bidder and in concluding an agreement with the bidder.



24.2. It follows therefore that misrepresentations in a Tender may give rise to service termination and a claim by C-BRTA against the bidder notwithstanding the conclusion of the Service Level Agreement between C-BRTA and the bidder for the provision of the Service in question. In the event of a conflict between the bidder's proposal and the Service Level Agreement concluded between the parties, the Service Level Agreement will prevail.

## **25. PREPARATION COSTS**

The Bidder will bear all its costs in preparing, submitting and presenting any response or Tender to this bid and all other costs incurred by it throughout the bid process. Furthermore, no statement in this bid will be construed as placing C-BRTA, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidder(s) in the preparation of their response to this bid.

## **26. INDEMNITY**

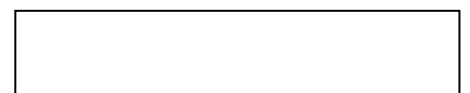
If a bidder breaches the conditions of this bid and, as a result of that breach, C-BRTA incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the bid process and/or enforcement of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds C-BRTA harmless from any and all such costs which C-BRTA may incur and for any damages or losses C-BRTA may suffer.

## **27. PRECEDENCE**

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this document by reference.

## **28. LIMITATION OF LIABILITY**

A bidder participates in this bid process entirely at its own risk and cost. C-BRTA shall not be liable to compensate a bidder on any grounds whatsoever for any costs incurred or any damages suffered as a result of the Bidder's participation in this Bid process.



## **29. TAX COMPLIANCE**

No tender shall be awarded to a bidder who is not tax compliant. C-BRTA reserves the right to withdraw an award made, or cancel a contract concluded with a successful bidder in the event that it is established that such bidder was in fact not tax compliant at the time of the award, or has submitted a fraudulent Tax Clearance Certificate to C-BRTA, or whose verification against the Central Supplier Database (CSD) proves non-compliant. C-BRTA further reserves the right to cancel a contract with a successful bidder in the event that such bidder does not remain tax compliant for the full term of the contract.

## **30. TENDER DEFAULTERS AND RESTRICTED SUPPLIERS**

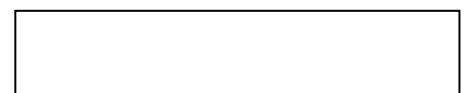
No tender shall be awarded to a bidder whose name (or any of its members, directors, partners or trustees) appears on the Register of Tender Defaulters kept by National Treasury, or who have been placed on National Treasury's List of Restricted Suppliers. C-BRTA reserves the right to withdraw an award, or cancel a contract concluded with a Bidder should it be established, at any time, that a bidder has been blacklisted with National Treasury by another government institution.

## **31. GOVERNING LAW**

South African law governs this bid and the bid response process. The bidder agrees to submit to the exclusive jurisdiction of the South African courts in any dispute of any kind that may arise out of or in connection with the subject matter of this bid, the bid itself and all processes associated with the bid.

## **32. RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL**

A bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this bid. In the event that C-BRTA allows a bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the bidder and C-BRTA will not under any circumstances be liable for any losses or damages incurred by or caused by such sub-contractors.





### **33. CONFIDENTIALITY**

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this bid or a bidder's tender(s) will be disclosed by any bidder or other person not officially involved with C-BRTA's examination and evaluation of a Tender.

No part of the bid may be distributed, reproduced, stored or transmitted, in any form or by any means, electronic, photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a Tender. This bid and any other documents supplied by C-BRTA remain proprietary to C-BRTA and must be promptly returned to C-BRTA upon request together with all copies, electronic versions, excerpts or summaries thereof or work derived there from.

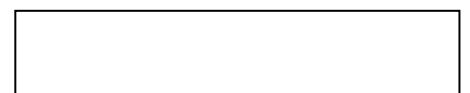
Throughout this bid process and thereafter, bidder(s) must secure C-BRTA's written approval prior to the release of any information that pertains to (i) the potential work or activities to which this bid relates; or (ii) the process which follows this bid. Failure to adhere to this requirement may result in disqualification from the bid process and civil action.

### **34. C-BRTA PROPRIETARY INFORMATION**

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

### **35. AVAILABILITY OF FUNDS**

Should funds no longer be available to pay for the execution of the responsibilities of this bid (Travel Request Proposal for Cross Border Road Transport Agency (the C-BRTA) may terminate the Agreement at its own discretion or temporarily suspend all or part of the services by notice to the successful bidder who shall immediately make arrangements to stop the performance of the services and minimize further expenditure: Provided that the successful bidder shall thereupon be entitled to payment in full for the services delivered, up to the date of cancellation or suspension.





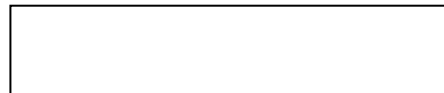
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**Annexure A2**

**DESKTOP EVALUATION TECHNICAL SCORECARD**

**AND COMPLIANCE CHECKLIST**

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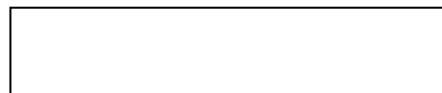


## ANNEXURE A2: DESKTOP EVALUATION TECHNICAL SCORECARD AND COMPLIANCE CHECKLIST

The form must be submitted in File 1 (Technical file).

### EXAMPLE OF HOW THE BIDDER MUST COMPLETE THE COMPLIANCE CHECKLIST:

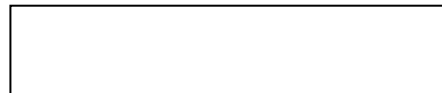
Section No	Technical Criteria	Reference page in Proposal	Comments
1.1	<b>Experience of the bidder</b>	Exhibit 2: Page 9 to 12	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
1.2	<b>Manage all reservations and bookings</b>	Exhibit 2: Page 13 to 15	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.
1.3	<b>Manage all refunds and non-refundable airline-tickets</b>	Exhibit 2: Page 17 to 20	Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement.



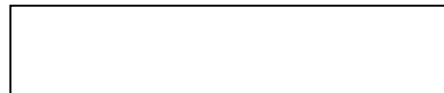
The Bidders will be evaluated according to the technical evaluation criteria in the scorecard below.

Bidders must indicate their ability to do the following and to substantiate as required with supporting documentation.

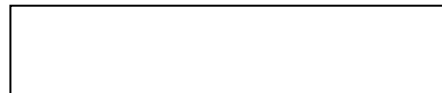
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<i>TO BE COMPLETED BY THE TENDERING INSTITUTION</i>				<i>TO BE COMPLETED BY THE BIDDER</i>	
<b>DESKTOP EVALUATION</b>		<b>100</b>			
<b>1</b>	<b>GENERAL</b>	<b>10</b>	<b>SECTION 15.3.2</b>		
1.1	Provide a detailed transition plan for implementing the service without service interruptions and engage with the incumbent service provider to ensure a smooth transition. Such transitional plan must at least detail the following subjects: training or obtaining qualified staff, obtaining the necessary software licensing and electronic hardware, engagement with and takeover from the former supplier, detailed timelines and actions to be taken.	3	Section 15.3.1 (j)		
1.2	Provide the reference letters from at least three (3) to a maximum of 5 contactable existing / recent clients (within past 3 years) which are of a similar size to the C-BRTA whom we may contact for references. The letter must include:	5	Section 15.3.1 (k)		



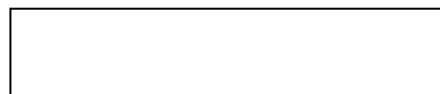
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	<p>company name, contact name, address, phone number, and duration of contract, value of the travel expenditure, a brief description of the services that you provided and the level of satisfaction.</p> <p>Take note that: less than three (3) reference letters will result in a zero marks. Three (3) letters will be allocated three (3) points, four (4) letters will be allocated four (4) points and five (5) letters will be allocated five (5) points.</p>				
1.3	<p>Provide proof of Travel Agent Association membership e.g. ASATA.</p> <p>Take note: failure to provide proof of membership will result in a zero point allocation.</p>	2	Section 15.3.1 (l)		



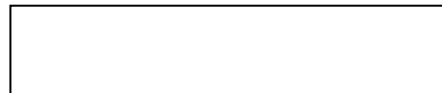
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2	<b>RESERVATIONS</b>	25	SECTION 15.3.2 TO 15.3.6		
2.1	<p><b>Manage all reservations / bookings.</b></p> <p>Describe how all travel reservations / bookings are handled e.g. hotel (accommodation); car rental; flights etc.</p> <p>This will include, without limitation, an example of a detailed complex itinerary confirmation that includes air, car, hotel, passport requirement, Visa requirement, confirmation numbers and additional proof of competency from the traveller.</p> <p>Take note: one (1) point will be allocated for the description and maximum total of seven (7) for the items on the complex itinerary.</p>	7	<p>Section 15.3.2</p> <p>Section 15.3.3</p> <p>Section 15.3.4</p> <p>Section 15.3.5</p>		
2.2	<p><b>Manage group bookings.</b></p> <p>Describe your capabilities for handling group bookings (e.g. for meetings, conferences (delegates up to 400 people, events etc.)). Please specify if these bookings would be done by the TMC or outsourced.</p> <p>Take note: four (4) points will be awarded for bidders you can show their capability of making successful group bookings in-house for 400 or more delegates. A further point to a maximum of two (2) points will be allocated for every contactable reference of a client for which the TMC did a group booking.</p>	6	Section 15.3.2 (i)		



#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
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2.3	<p><b>Directly negotiated rates</b></p> <p>Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that are negotiated directly or established by National Treasury or by the C-BRTA are <b>non-commissionable</b>, where commissions are earned for C-BRTA bookings, all these commissions should be returned to the CBRTA on a quarterly basis.</p> <p>Describe how these specific rates will be secured and reported on (2 points). Describe any automated tools that will be used to assist with maintenance and processing of the said negotiated rates for service provider with whom there are no pre-negotiated rates (2). Describe the way of reporting on and paying over of any commission earned as a result of C-BRTA bookings.</p>	4	Section 15.3.2 (q)		
2.4	<p><b>Manage airline reservations.</b></p> <p>Describe in detail the process of booking the most cost-effective and practical routing for the traveller.</p> <p>This will include, without limitation, the refund process (one point) and how you manage the unused non-refundable airline tickets (one point), your ability to secure special airline services for traveller(s) including preferred seating, waitlist clearance, special meals, travellers with disabilities (one point).</p>	3	Section 15.3.3		
2.5	<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-hour support e.g.</p> <ul style="list-style-type: none"> <li>- how it is accessed by Travellers (one point),</li> <li>- where it is located, centralized/ regionalised, in-country (owned)/ outsourced etc (one point).</li> <li>- is it available 24/7/365 (two points)</li> <li>- Reminders to the C-BRTA to process purchase orders within 24 hours to reduce queries on invoices (one point).</li> </ul>	5	Section 15.3.6		

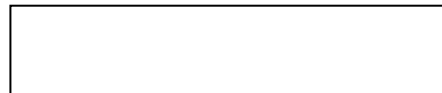


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<b>3</b>	<b>COMMUNICATION</b>	<b>10</b>	<b>SECTION 15.4</b>		
3.1	<p>Describe how you will ensure that travel bookers are informed of the travel booking processes.</p> <p>Describe your communication process where the traveller, travel co-ordinator / booker and travel management company will be linked in one smooth continuous workflow (2 points). The TMC must demonstrate its capability as part of the communication process to include: SMS notifications of entire booking (2 points), voucher for car rentals, accommodation, and shuttle (2 points), e-tickets for flights (2 points) and emails (2 points).</p>	10	Section 15.4		
<b>4</b>	<b>FINANCIAL MANAGEMENT</b>	<b>15</b>	<b>SECTION 15.5</b>		
4.1	<p>Describe how you will manage the 30-day bill-back account facility. Such description must include the annual financial statement of the TMC to describe their capability to support the C-BRTA (2 points).</p> <p>Describe with supporting documents how pre-payments will be handled where it is required for smaller Bed &amp; Breakfast / Guest House facilities (3 points).</p> <p>Bidders are required to provide a SOP which described and sets out the process of rectifying discrepancies between purchase orders and invoices (3 points), reconciliation of transactions and the timely provision of invoices to the C-BRTA (3 points).</p> <p>Please describe credit card reconciliation process, timing and deliverables (4 points).</p>	15	Section 15.5		





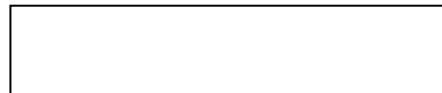
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5	<b>TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING</b>	10	SECTION 15.6		
5.1	<p>Bidders are required to submit an example of a Management Information System Report (MIS) which report must cover the items below:</p> <p>Supplier list for accommodation, air fare, shuttle, venues and conferences.</p> <p>Top 20 Travelers (amounts and items of expenditure).</p> <p>Late bookings.</p> <p>Executive summary dashboard</p> <p>Service fees</p> <p>After hours report</p> <p>Savings</p> <p>Travel dates</p> <p>Top ten route</p> <p>Reference source</p>	10	Section 15.6		



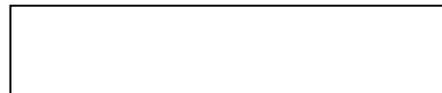
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	No point will be allocated for failure to comply with the above.				
<b>6</b>	<b>ACCOUNT MANAGEMENT</b>	<b>10</b>	<b>SECTION 15.7</b>		
6.1	<p>Provide a depiction of the proposed Account Management structure / organogram (2 points).</p> <p>Provide a Standard Operating Procedure document which reflects -</p> <ul style="list-style-type: none"> <li>reflects the quality control procedures / processes you have in place to ensure that your clients receive consistent quality service (1 Points);</li> <li>how queries, requests, changes and cancellations will be handled. What is your mitigation and issue resolution process? Provide a detailed response indicating performance standards with respect to resolving service issues. Complaint handling procedure must be submitted (4 points);</li> <li>the measures in place to ensure that the C-BRTA's travel Policy is enforced in line with National Treasury travel framework (1 point);</li> <li>how will you manage the service levels in the SLA and how will you go about doing customer satisfaction surveys (1 point); and</li> <li>what workshops / training will be provided to Travellers and / or Travel Bookers (1 point).</li> </ul>	10	<p>Section 15.7.1 and 15.7.2</p> <p>Section 15.7.3</p> <p>Section 15.7.4</p> <p>Section 15.7.5</p>		



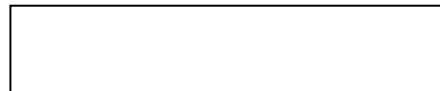
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			Section 15.7.6 Section 15.7.7		
<b>7</b>	<b>VALUE ADDED SERVICES</b>	<b>5</b>	<b>SECTION 15.8</b>		
7.1	Identify value-added services that your company can offer as well as a description of the service. (1 point will be allocated for every service to a maximum of 5 points).	5	Section 15.8		
<b>8</b>	<b>COST MANAGEMENT</b>	<b>5</b>	<b>SECTION 15.9</b>		
8.1	Describe your detailed strategic cost savings plan for the contract duration including, but not limited to, annual conferences and event, general travel and bulk bookings (3 points).  Take notice: any additional strategic cost saving measure will be allocated an additional point to the maximum of 5 points.	5	Section 15.9		
<b>9</b>	<b>QUARTERLY AND ANNUAL TRAVEL REVIEWS</b>	<b>5</b>	<b>SECTION 15.10</b>		



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9.1	Provide a sample of a Quarterly and Annual review used for performance management during the life cycle of the contract.  Implementation of cost containment measures (2 points) compliance with service level agreement (2 points) and any other information required by C-BRTA (1 point).	5	Section 15.10				
<b>10</b>	<b>OFFICE MANAGEMENT</b>	<b>5</b>	<b>SECTION 15.11</b>				
10.1	Submit the Standard Operating Procedure for invoicing to cover an overview of your back-office processes detailing the degree of automation for air tickets workflow, ground arrangements and bill back workflow.( 3 Points)  Provide the responsibility matrix for the proposed assigned staff. Provide the management hierarchy. (2 points)	5	Section 15.11				
	<b>PRESENTATION</b>	100					
	<b>Functional Evaluation (Phase 2(B))</b> The bids were subjected to the following functional criteria.  <b>Functional Criteria for evaluation</b> <table border="1" style="width: 100%; margin-top: 5px;"> <tr> <td style="text-align: center;">Evaluation Criteria - Phase 2(B) Internal Audit Services</td> </tr> <tr> <td> </td> </tr> </table>	Evaluation Criteria - Phase 2(B) Internal Audit Services		70			
Evaluation Criteria - Phase 2(B) Internal Audit Services							



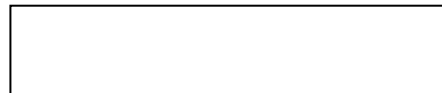
#	TECHNICAL EVALUATION CRITERION	WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS			
<i>TO BE COMPLETED BY THE TENDERING INSTITUTION</i>				<i>TO BE COMPLETED BY THE BIDDER</i>				
	<p style="text-align: center;"><b>Take note: A bidder who obtains less than 70 points in this functionality phase shall be excluded from the next phase, Phase 3, of evaluation</b></p> <p><b>PHASE (2B) PRESENTATION</b></p> <p style="text-align: center;"><b>Presentation (70 points)</b></p> <p>The prospective service provider must provide a presentation in accordance with the scope of the work, that demonstrates how their travel services will provide value to the C-BRTA, according to the following criteria:</p> <ul style="list-style-type: none"> <li>• <b>Leadership (20 points)</b> – bidders must demonstrate how their experience will deliver value</li> <li>• <b>Relationship Management (15 points)</b> – bidders must demonstrate how this will be managed</li> <li>• <b>Communication (15 points)</b> – bidders must demonstrate how they will communicate with C-BRTA (Travel bookers and Travellers)</li> <li>• <b>Governance (15 points)</b> – bidders must demonstrate how they will track performance, continuous improvement, client satisfaction, and staff retention</li> <li>• <b>Methodology, Approach and Technical skill of key resources dedicated to the C-BRTA (5 points)</b> – bidders must demonstrate how team knowledge and experience will deliver value, summary of challenges previously experienced and resolution, travel methodology and approach</li> </ul> <p style="text-align: center;"><b>Past performance of the bidder (30 points)</b></p> <p>Proof from contactable references indicating similar work successfully executed</p> <table border="1" style="width: 100%; margin-top: 10px;"> <tr> <td style="width: 33%; text-align: center;"><b>20 points</b></td> <td style="width: 33%; text-align: center;"><b>10 points</b></td> <td style="width: 33%; text-align: center;"><b>0 points</b></td> </tr> </table>	<b>20 points</b>	<b>10 points</b>	<b>0 points</b>				
<b>20 points</b>	<b>10 points</b>	<b>0 points</b>						



#	TECHNICAL EVALUATION CRITERION				WEIGHT	REFERENCE IN BID DOCUMENT	REFERENCE PAGE IN BIDDERS PROPOSAL	COMMENTS
<b>TO BE COMPLETED BY THE TENDERING INSTITUTION</b>							<b>TO BE COMPLETED BY THE BIDDER</b>	
	5 references and with successful execution of travel services	3-5 references with successful execution of travel services	0-2 references with successful execution of travel services					
<p>The second element of Phase 2(B) is the reference checks. A reference check document will be sent to all references that were provided by bidders as part of the proposal in the bid documents.</p>								

The evaluation process will follow a two phase approach. The first phase will be the technical evaluation. Bidders who met the minimum technical threshold of 70 point will proceed to the second phase being price and BBEE level of contribution.

Allocation of points for the evaluation process		
Technical evaluation	Minimum threshold 70	Total points out of a 100
Price	80	100
BBEE level of contribution	20	



**BIDDER DECLARATION (Section 22)**

The bidder hereby declare the following:

We confirm that \_\_\_\_\_ (Bidder's Name) will: –

- i. Act honestly, fairly, and with due skill, care and diligence, in the interests of C-BRTA;
- j. Employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- k. Act with circumspection and treat C-BRTA fairly in a situation of conflicting interests;
- l. Comply with all applicable statutory or common law requirements applicable to the conduct of business;
- m. Make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with C-BRTA;
- n. Avoid fraudulent and misleading advertising, canvassing and marketing;
- o. Conduct business activities with transparency and consistently uphold the interests and needs of C-BRTA as a client before any other consideration; and
- p. Ensure that any information acquired by the bidder(s) from C-BRTA will not be used or disclosed unless the written consent of the client has been obtained to do so.

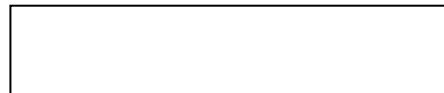
Signature \_\_\_\_\_

Date \_\_\_\_\_

Print Name of Signatory: \_\_\_\_\_

Designation: \_\_\_\_\_

FOR AND ON BEHALF OF: \_\_\_\_\_ (Bidding Company's Name)



**ANNEXURE A**

**SBD 1: INVITATION TO BID**

**YOU ARE HEREBY INVITED TO BID FOR REQUIREMENTS OF THE CROSS-BORDER ROAD TRANSPORT AGENCY**

**BID NUMBER: C-BRTA/HO/0059 CLOSING DATE: 06<sup>th</sup> NOVEMBER 2020**

**CLOSING TIME: 14h00**

**DESCRIPTION: Appointment of service provider for Travel Management Services over the period of 36 months**

---

**The successful bidder will be required to complete and sign a Contract Form (SBD 7.2).**

---

**BID DOCUMENTS MAY BE POSTED TO:**

**Cross Border Road Transport,  
350 Witch-Hazel Avenue,  
Eco Point Office Park,  
Centurion,  
Pretoria**

**OR**

**DEPOSITED IN THE BID BOX SITUATED AT (STREET ADDRESS)**

**Cross Border Road Transport Agency  
Block A, Eco Park  
Centurion  
Pretoria**

Bidders should ensure that bids are delivered timeously to the correct address. If the bid is late, it will not be accepted for consideration.

The bid box is generally open from Monday to Friday from 7h30 to 16h00.

**ALL BIDS MUST BE SUBMITTED ON THE OFFICIAL FORMS – (NOT TO BE RE-TYPED)**

THIS BID IS SUBJECT TO THE PREFERENTIAL PROCUREMENT POLICY FRAMEWORK ACT AND THE PREFERENTIAL PROCUREMENT REGULATIONS, 2011, THE GENERAL CONDITIONS OF CONTRACT (GCC) AND, IF APPLICABLE, ANY OTHER SPECIAL CONDITIONS OF CONTRACT

**THE FOLLOWING PARTICULARS MUST BE FURNISHED (FAILURE TO DO SO WILL RESULT IN YOUR BID BEING DISQUALIFIED)**

NAME OF BIDDER: .....

POSTAL ADDRESS: .....





STREET ADDRESS: .....

TELEPHONE NUMBER: CODE: ..... NUMBER:.....

**CELLPHONE NUMBER:** .....

FACSIMILE NUMBER: CODE ..... NUMBER: .....

E-MAIL ADDRESS: .....

VAT REGISTRATION NUMBER: .....

HAS AN ORIGINAL AND VALID TAX CLEARANCE CERTIFICATE BEEN SUBMITTED?  
(SBD 2) YES or NO

HAS A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE BEEN SUBMITTED? (SBD  
6.1) YES or NO

IF YES, WHO WAS THE CERTIFICATE ISSUED BY [TICK APPLICABLE BOX]

?

AN ACCOUNTING OFFICER AS CONTEMPLATED IN THE CLOSE CORPORATION  
ACT (CCA)

A VERIFICATION AGENCY ACCREDITED BY THE SOUTH AFRICAN  
ACCREDITATION SYSTEM (SANAS);

A REGISTERED AUDITOR

**(A B-BBEE STATUS LEVEL VERIFICATION CERTIFICATE MUST BE SUBMITTED IN  
ORDER TO QUALIFY FOR PREFERENCE POINTS FOR B-BBEE)**

***ARE YOU THE ACCREDITED REPRESENTATIVE***  
IN SOUTH AFRICA FOR THE GOODS / SERVICES / WORKS OFFERED?

YES or NO (IF YES ENCLOSE PROOF)

SIGNATURE OF BIDDER: .....

DATE: .....

CAPACITY UNDER WHICH THIS BID IS SIGNED: .....

TOTAL BID PRICE: .....

TOTAL NUMBER OF ITEMS OFFERED: .....

**ANY ENQUIRIES REGARDING THE BIDDING PROCEDURE MAY BE DIRECTED TO:**

**Department: Supply Chain Management**



**Contact Person: Morwamoche. Sekhukhune**

**Tel: 012 471 2000**

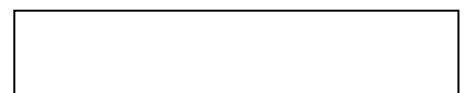
**E-mail address: Morwamoche.Sekhukhune@C-BRTA.co.za**

**ANY ENQUIRIES REGARDING TECHNICAL INFORMATION MAY BE DIRECTED TO:**

**Contact Person: Morwamoche Sekhukhune**

**Tel: + 27 12 471 2000**

**E-mail address: morwamoche.sekhukhune@C-BRTA.co.za**



**ANNEXURE B**

**SBD 2: TAX CLEARANCE REQUIREMENTS**

It is a condition of bid that the taxes of the successful bidder must be in order at the time of award, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.



ANNEXURE C
SBD 3.3 PRICING SCHEDULE
(Professional Services)

NAME OF BIDDER: ..... BID NO: C-BRTA/HO/0059
CLOSING TIME: 14H00 CLOSING DATE: 06th NOVEMBER 2020

OFFER TO BE VALID FOR 90 DAYS FROM THE CLOSING DATE OF BID.

Table with 3 columns: ITEM NO, DESCRIPTION, BID PRICE IN RSA CURRENCY. Includes a note: \*\*(ALL APPLICABLE TAXES INCLUDED)

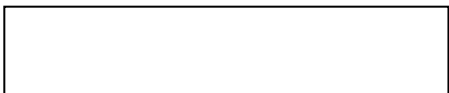
- 1. The accompanying information must be used for the formulation of proposals.
2. Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses inclusive of all applicable taxes for the project. R .....

3. PERSONS WHO WILL BE INVOLVED IN THE PROJECT AND RATES APPLICABLE (CERTIFIED INVOICES MUST BE RENDERED IN TERMS HEREOF)

Table with 3 columns: PERSON AND POSITION, HOURLY RATE, DAILY RATE. Includes rows for R-----

5. PHASES ACCORDING TO WHICH THE PROJECT WILL BE COMPLETED, COST PER PHASE AND MAN-DAYS TO BE SPENT

Table with 3 columns: Description, R-----, days. Includes rows for R----- days



5.1. Travel expenses (specify, for example rate/km and total km, class of air travel, etc.). Only actual costs are recoverable. Proof of the expenses incurred must accompany certified invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
-----	.....	.....	R.....
-----	.....	.....	R.....
-----	.....	.....	R.....
-----	.....	.....	R.....
TOTAL:			R.....

\*\* "all applicable taxes" includes value- added tax, pay as you earn, income tax, unemployment insurance fund contributions and skills development levies.

5.2 Other expenses, for example accommodation (specify, e.g. Three-star hotel, bed and breakfast, telephone cost, reproduction cost, etc.). On basis of these particulars, certified invoices will be checked for correctness. Proof of the expenses must accompany invoices.

DESCRIPTION OF EXPENSE TO BE INCURRED	RATE	QUANTITY	AMOUNT
-----	.....	.....	R.....
-----	.....	.....	R.....
-----	.....	.....	R.....
-----	.....	.....	R.....
TOTAL:			R.....

6. Period required for commencement with project after acceptance of bid .....

7. Estimated man-days for completion of project .....

8. Are the rates quoted firm for the full period of contract? \*YES/NO

9. If not firm for the full period, provide details of the basis on which adjustments will be applied for, for example consumer price index.

.....  
 .....



**ANNEXURE D**

**SBD 4: DECLARATION OF INTEREST**

1. Any legal person, including persons employed by the state<sup>1</sup>, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes a price quotation, advertised competitive bid, limited bid or proposal). In view of possible allegations of favoritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorized representative declare his/her position in relation to the evaluating/adjudicating authority where-

- The bidder is employed by the state; and/or
- The legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.

**2. In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

2.1 Full Name of bidder or his or her representative: .....

2.2 Identity Number: .....

2.3 Position occupied in the Company (director, trustee, shareholder<sup>2</sup>): .....

2.4 Company Registration Number: .....

2.5 Tax Reference Number: .....

2.6 VAT Registration Number: .....

2.6.1 The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / persal numbers must be indicated in paragraph 3 below.

<sup>1</sup>“State” means –

- (a) Any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) Any municipality or municipal entity;
- (c) Provincial legislature;
- (d) National Assembly or the national Council of provinces; or
- (e) Parliament.

<sup>2</sup> “Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

2.7 Are you or any person connected with the bidder  
Presently employed by the state? **YES / NO**

2.7.1 If so, furnish the following particulars:

Name of person / director / trustee / shareholder/ member: .....

Name of state institution at which you or the person connected to the bidder is employed:.....

Position occupied in the state institution: .....

Any other particulars:

.....  
.....

2.7.2 If you are presently employed by the state, did you obtain **YES / NO**  
The appropriate authority to undertake remunerative work outside employment in the public sector?

2.7.2.1 If yes, did you attach proof of such authority to the bid document? **YES / NO**

(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.

2.7.2.2 If no, furnish reasons for non-submission of such proof:

.....  
.....

2.8 Did you or your spouse, or any of the company's directors / **YES / NO**  
Trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?

2.8.1 If so, furnish particulars:

.....  
.....

2.9 Do you, or any person connected with the bidder, have **YES / NO**  
Any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?

2.9.1 If so, furnish particulars.

.....  
.....

2.10 Are you, or any person connected with the bidder, **YES / NO**  
Aware of any relationship (family, friend, other) between any other bidder and any person employed by the state who may be involved with the evaluation and or adjudication of this bid?

2.10.1 If so, furnish particulars .....

.....



2.11 Do you or any of the directors / trustees / shareholders / members **YES / NO**  
 Of the company have any interest in any other related companies whether or not they are  
 bidding for this contract?

2.11.1 If so, furnish particulars: .....

.....

3 Full details of directors / trustees / members / shareholders.

Full Name	Identity Number	Personal Tax Reference Number	State Employee Number / Persal Number

4 DECLARATION

I, THE UNDERSIGNED (NAME).....

CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 2 and 3 ABOVE IS CORRECT.

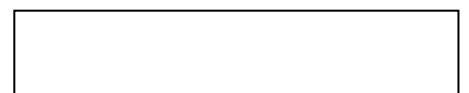
I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 23 OF THE GENERAL CONDITIONS OF CONTRACT SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....  
 Signature

.....  
 Date

.....  
 Position

.....  
 Name of bidder





## ANNEXURE E:

### SBD 6.1

#### PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2017

This preference form must form part of all bids invited. It contains general information and serves as a claim form for preference points for Broad-Based Black Economic Empowerment (B-BBEE) Status Level of Contribution

**NB: BEFORE COMPLETING THIS FORM, BIDDERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF B-BBEE, AS PRESCRIBED IN THE PREFERENTIAL PROCUREMENT REGULATIONS, 2017.**

---

#### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to all bids:

- the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and
- the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2

- a) The value of this bid is estimated to not exceed R50 000 000 (all applicable taxes included) and therefore the 80/20 preference point system shall be applicable; or
- b) Either the 80/20 or 90/10 preference point system will be applicable to this tender (*delete whichever is not applicable for this tender*).

1.3 Points for this bid shall be awarded for:

- (a) Price; and
- (b) B-BBEE Status Level of Contributor.

1.4 The maximum points for this bid are allocated as follows:

	POINTS
<b>PRICE</b>	<b>80</b>
<b>B-BBEE STATUS LEVEL OF CONTRIBUTOR</b>	<b>20</b>
<b>Total points for Price and B-BBEE must not exceed</b>	<b>100</b>

1.5 Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

1.6 The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.





**4. POINTS AWARDED FOR B-BBEE STATUS LEVEL OF CONTRIBUTOR**

4.1 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)	
(2)	1	(3)	10	(4)	20
(5)	2	(6)	9	(7)	18
(8)	3	(9)	6	(10)	14
(11)	4	(12)	5	(13)	12
(14)	5	(15)	4	(16)	8
(17)	6	(18)	3	(19)	6
(20)	7	(21)	2	(22)	4
(23)	8	(24)	1	(25)	2
(26)	Non-compliant contributor	(27)	0	(28)	0

**5. BID DECLARATION**

5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

**6. B-BBEE STATUS LEVEL OF CONTRIBUTOR CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 4.1**

6.1 B-BBEE Status Level of Contributor: = .....(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

**7. SUB-CONTRACTING**

7.1 Will any portion of the contract be sub-contracted?

**(Tick applicable box)**

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

7.1.1 If yes, indicate:

- i) What percentage of the contract will be subcontracted.....%
- ii) The name of the sub-contractor.....
- iii) The B-BBEE status level of the sub-contractor.....
- iv) Whether the sub-contractor is an EME or QSE

**(Tick applicable box)**

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
-----	--------------------------	----	--------------------------



v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations,2017:

<b>Designated Group: An EME or QSE which is at last 51% owned by:</b>	<b>EME</b> √	<b>QSE</b> √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
<b>OR</b>		
Any EME		
Any QSE		

**8. DECLARATION WITH REGARD TO COMPANY/FIRM**

8.1 Name of company/firm:.....

8.2 VAT registration number:.....

8.3 Company registration number:.....

**8.4 TYPE OF COMPANY/ FIRM**

- Partnership/Joint Venture / Consortium
- One person business/sole propriety
- Close corporation
- Company
- (Pty) Limited

[TICK APPLICABLE BOX]

**8.5 DESCRIBE PRINCIPAL BUSINESS ACTIVITIES**

.....  
 .....  
 .....  
 .....  
 .....

**8.6 COMPANY CLASSIFICATION**

- Manufacturer
- Supplier
- Professional service provider
- Other service providers, e.g. transporter, etc.

[TICK APPLICABLE BOX]

8.7 Total number of years the company/firm has been in business:.....

8.8 I/we, the undersigned, who is / are duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the B-BBE status level of



contributor indicated in paragraphs 1.4 and 6.1 of the foregoing certificate, qualifies the company/ firm for the preference(s) shown and I / we acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 6.1, the contractor may be required to furnish documentary proof to the satisfaction of the purchaser that the claims are correct;
- iv) If the B-BBEE status level of contributor has been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the purchaser may, in addition to any other remedy it may have –
  - (a) disqualify the person from the bidding process;
  - (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
  - (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
  - (d) recommend that the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted by the National Treasury from obtaining business from any organ of state for a period not exceeding 10 years, after the *audi alteram partem* (hear the other side) rule has been applied; and
  - (e) Forward the matter for criminal prosecution.

WITNESSES
1. ....
2. ....

.....
SIGNATURE(S) OF BIDDERS(S)
DATE: .....
ADDRESS .....
.....
.....



CONTRACT FORM – TRAVEL MANAGEMENT SERVICES

THIS FORM MUST BE FILLED IN DUPLICATE BY BOTH THE SERVICE PROVIDER (PART 1) AND THE PURCHASER (PART 2). BOTH FORMS MUST BE SIGNED IN THE ORIGINAL SO THAT THE SERVICE PROVIDER AND THE PURCHASER WOULD BE IN POSSESSION OF ORIGINALLY SIGNED CONTRACTS FOR THEIR RESPECTIVE RECORDS.

PART 1 (TO BE FILLED IN BY THE SERVICE PROVIDER)

1. I hereby undertake to render services described in the attached bidding documents to **Cross Border Road Transport Agency** in accordance with the requirements and task directives / proposals specifications stipulated in Bid Number **C-BRTA/HO/0059** at the price/s quoted. My offer/s remain binding upon me and open for acceptance by the Purchaser during the validity period indicated and calculated from the closing date of the bid.
2. The following documents shall be deemed to form and be read and construed as part of this agreement:
  - (i) Bidding documents, viz
    - Invitation to bid;
    - Tax clearance certificate;
    - Pricing schedule(s);
    - Filled in task directive/proposal;
    - Preference claims for Broad Based Black Economic Empowerment Status Level of Contribution in terms of the Preferential Procurement Regulations 2011;
    - Declaration of interest;
    - Declaration of bidder’s past SCM practices;
    - Certificate of Independent Bid Determination;
    - Special Conditions of Contract;
  - (ii) General Conditions of Contract; and
  - (iii) Other (specify)
3. I confirm that I have satisfied myself as to the correctness and validity of my bid; that the price(s) and rate(s) quoted cover all the services specified in the bidding documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.
4. I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this agreement as the principal liable for the due fulfillment of this contract.
5. I declare that I have no participation in any collusive practices with any bidder or any other person regarding this or any other bid.
6. I confirm that I am duly authorized to sign this contract.

NAME (PRINT) .....

CAPACITY .....

SIGNATURE .....

NAME OF FIRM .....

DATE .....

WITNESSES	
1	.....
2	.....



**CONTRACT FORM – TRAVEL MANAGEMENT SERVICES**

**PART 2 (TO BE FILLED IN BY THE PURCHASER)**

1. I..... in my capacity as .....  
Accept your bid under reference number ..... dated..... for the rendering of services indicated hereunder and/or further specified in the annexure(s).
2. An official order indicating service delivery instructions is forthcoming.
3. I undertake to make payment for the services rendered in accordance with the terms and conditions of the contract, within 30 (thirty) days after receipt of an invoice.

DESCRIPTION OF SERVICE	PRICE (ALL APPLICABLE TAXES INCLUDED)	COMPLETION DATE	B-BBEE STATUS LEVEL OF CONTRIBUTION

4. I confirm that I am duly authorized to sign this contract.

SIGNED AT .....ON.....

NAME (PRINT) .....

SIGNATURE .....

OFFICIAL STAMP

**WITNESSES**

1 .....

....

2 .....

## ANNEXURE G

### SBD 8: DECLARATION OF BIDDER'S PAST SUPPLY CHAIN MANAGEMENT PRACTICES

- 1 This Standard Bidding Document must form part of all bids invited.
- 2 It serves as a declaration to be used by institutions in ensuring that when goods and services are being procured, all reasonable steps are taken to combat the abuse of the supply chain management system.
- 3 The bid of any bidder may be disregarded if that bidder, or any of its directors have-
  - a. abused the institution's supply chain management system;
  - b. committed fraud or any other improper conduct in relation to such system; or
  - c. failed to perform on any previous contract.

**4 In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.**

Item	Question	Yes	No
4.1	<p>Is the bidder or any of its directors listed on the National Treasury's Database of Restricted Suppliers as companies or persons prohibited from doing business with the public sector?</p> <p>(Companies or persons who are listed on this Database were informed in writing of this restriction by the Accounting Officer/Authority of the institution that imposed the restriction after the <i>audi alteram partem</i> rule was applied).</p> <p><b>The Database of Restricted Suppliers now resides on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) and can be accessed by clicking on its link at the bottom of the home page.</b></p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.1.1	If so, furnish particulars:		
4.2	<p>Is the bidder or any of its directors listed on the Register for Tender Defaulters in terms of section 29 of the Prevention and Combating of Corrupt Activities Act (No 12 of 2004)?</p> <p><b>The Register for Tender Defaulters can be accessed on the National Treasury's website (<a href="http://www.treasury.gov.za">www.treasury.gov.za</a>) by clicking on its link at the bottom of the home page.</b></p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.2.1	If so, furnish particulars:		
4.3	<p>Was the bidder or any of its directors convicted by a court of law (including a court outside of the Republic of South Africa) for fraud or corruption during the past five years?</p>	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.3.1	If so, furnish particulars:		





4.4	Was any contract between the bidder and any organ of state terminated during the past five years on account of failure to perform on or comply with the contract?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
4.4.1	If so, furnish particulars:		

**CERTIFICATION**

**I, THE UNDERSIGNED (FULL NAME).....**

**I ACCEPT THAT, IN ADDITION TO CANCELLATION OF A CONTRACT, ACTION MAY BTAKEN AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.**

.....

**Signature**

.....

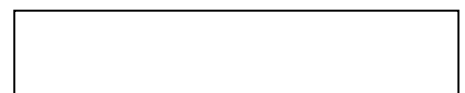
**Date**

.....

**Position**

.....

**Name of Bidder**



## ANNEXURE: H

### SBD 9: CERTIFICATE OF INDEPENDENT BID DETERMINATION

1 This Standard Bidding Document (SBD) must form part of all bids<sup>1</sup> invited.

2 Section 4 (1) (b) (iii) of the Competition Act No. 89 of 1998, as amended, prohibits an agreement between, or concerted practice by, firms, or a decision by an association of firms, if it is between parties in a horizontal relationship and if it involves collusive bidding (or bid rigging).<sup>2</sup> Collusive bidding is a *pe se* prohibition meaning that it cannot be justified under any grounds.

3 Treasury Regulation 16A9 prescribes that accounting officers and accounting authorities must take all reasonable steps to prevent abuse of the supply chain management system and authorizes accounting officers and accounting authorities to:

- a. disregard the bid of any bidder if that bidder, or any of its directors have abused the institution's supply chain management system and or committed fraud or any other improper conduct in relation to such system.
- b. cancel a contract awarded to a supplier of goods and services if the supplier committed any corrupt or fraudulent act during the bidding process or the execution of that contract.

4 This SBD serves as a certificate of declaration that would be used by institutions to ensure that, when bids are considered, reasonable steps are taken to prevent any form of bid-rigging.

5 In order to give effect to the above, the attached Certificate of Bid Determination (SBD 9) must be completed and submitted with the bid:

<sup>1</sup> Includes price quotations, advertised competitive bids, limited bids and proposals.

<sup>2</sup> Bid rigging (or collusive bidding) occurs when businesses, that would otherwise be expected to compete, secretly conspire to raise prices or lower the quality of goods and / or services for purchasers who wish to acquire goods and / or services through a bidding process. Bid rigging is, therefore, an agreement between competitors not to compete.



**SBD 9: CERTIFICATE OF INDEPENDENT BID DETERMINATION**

I, the undersigned, in submitting the accompanying bid:

---

(Bid Number and Description)

in response to the invitation for the bid made by:

---

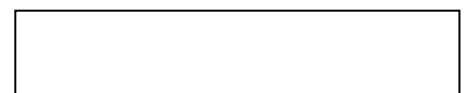
(Name of Institution)

Do hereby make the following statements that I certify to be true and complete in every respect:

I certify, on behalf of: \_\_\_\_\_ that:

(Name of Bidder)

1. I have read and I understand the contents of this Certificate;
2. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
3. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
4. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
5. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:
  - (a) Has been requested to submit a bid in response to this bid invitation;
  - (b) Could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and
  - (c) Provides the same goods and services as the bidder and/or is in the same line of business as the bidder
6. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium<sup>3</sup> will not be construed as collusive bidding.
7. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:
  - (a) prices;
  - (b) geographical area where product or service will be rendered (market allocation)
  - (c) methods, factors or formulas used to calculate prices;
  - (d) the intention or decision to submit or not to submit, a bid;



(e) The submission of a bid which does not meet the specifications and conditions of the bid;  
or

(f) Bidding with the intention not to win the bid.

8. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.

9. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.

10. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

.....

Signature

.....

Date

.....

Position

.....

Name of Bidder

**<sup>3</sup> Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.**

