



planning, monitoring  
& evaluation

Department:  
Planning, Monitoring and Evaluation  
REPUBLIC OF SOUTH AFRICA

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## **ANNEXURE A2**

**DESKTOP**

**AND**

**TECHNICAL EVALUATION**

**(PRESENTATION AND ONLINE DEMONSTRATION)**

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## ANNEXURE A2: DESKTOP AND TECHNICAL EVALUATION (PRESENTATION AND ONLINE DEMOSTRATION)

The form must be submitted in File 1 (Technical file), Exhibit 2(Refer to par. 9.2 of the ToR).The bidders must ensure that their technical proposal is clearly structured to cover all the sections as per listed criteria's below.

### 1. Annexure A2 - Part 1: Desktop Evaluation Criteria

#	TECHNICAL EVALUATION CRITERION	MOTIVATION / RESPONSE (TO BE COMPLETED BY THE BIDDER)
1	<p>The bidder is able to provide the travel services required by the department (can facilitate all services indicated under par 12.3 of this document as well as the costing sheet)</p> <ul style="list-style-type: none"> <li>• <i>Cannot provide all the services required (Score=0)</i></li> <li>• <i>Can provide all the services required (Score = 4)</i></li> </ul>	
2	<p>Office management</p> <ul style="list-style-type: none"> <li>• <i>Key Account Manager has 3 years' experience (Score = 1)</i></li> <li>• <i>Key Account Manager has more than 3 years' experience (Score = 2)</i></li> <li>• <i>Key Account Manager has more than 4 years' experience (Score =3 )</i></li> <li>• <i>Key Account Manager has more than 5 years' experience (Score = 4)</i></li> </ul>	
3	<p>After hours call centre</p> <ul style="list-style-type: none"> <li>• <i>No after-hours support available (Score=0)</i></li> <li>• <i>Trained staff on call 24 hours per day, 7 days a week, 365 days a year (Score = 4)</i></li> </ul>	
4	<p>Online booking tool</p> <ul style="list-style-type: none"> <li>• <i>Third-party online booking tool that cannot be customised to DPME requirements (Score = 1)</i></li> <li>• <i>Online booking tool that can be customised to DPME requirements - each change will be at a cost to DPME (Score = 2)</i></li> </ul>	

#	TECHNICAL EVALUATION CRITERION	MOTIVATION / RESPONSE (TO BE COMPLETED BY THE BIDDER)
	<ul style="list-style-type: none"> <li>• <i>Online booking tool that can be customised to DPME requirements - initial setup at a cost to DPME, but subsequent changes free of charge (Score = 3)</i></li> <li>• <i>Online booking tool available that is fully customisable to DPME requirements at no cost to DPME (Score = 4)</i></li> </ul>	
5	<p>The bidder can fully comply with all National Treasury negotiated rates, limits and reporting requirements.</p> <ul style="list-style-type: none"> <li>• <i>The bidder cannot comply with the stipulated requirements (Score=0)</i></li> <li>• <i>Bidder can fully comply with requirements (Score = 4)</i></li> </ul>	

A bidder must receive at least 300 out of 400 points (75%) to proceed to Gate 2. The points received for each criteria will be calculated by averaging the scores awarded by each Bid Evaluation Committee member.

**2. Gate 2: Technical Evaluation Criteria – Site visit presentation and online tool**

**Annexure A2: Part 2 (Presentation)**

#	TECHNICAL EVALUATION CRITERION	COMMENTS
1	<p>Reservations for international and domestic trips and related services including group bookings, travel Insurance, forex and etc. The service provider meets the requirements stipulated under par. 12.3.2</p> <ul style="list-style-type: none"> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation
2	<p>The service provider has systems in place to ensure that all DPME policy provisions, National Treasury instructions and cost containment measures are complied with for all travel bookings:</p> <ul style="list-style-type: none"> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation

#	TECHNICAL EVALUATION CRITERION	COMMENTS
3	<p>Financial management. The service provider meets the requirements stipulated under par.12.5</p> <ul style="list-style-type: none"> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation
4	<p>Reporting and Management of Information. The service provider meets the requirements stipulated under par. 12.6</p> <ul style="list-style-type: none"> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation
5	<p>Cost management. The service provider meets the requirements stipulated under par. 12.9</p> <ul style="list-style-type: none"> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation

#	TECHNICAL EVALUATION CRITERION	COMMENTS
6	<p>Air travel: The service provider meets the requirements stipulated under par. 12.3.3</p> <ul style="list-style-type: none"> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation
7	<p>Accommodation, Venues and Facilities: The service provider meets the requirements stipulated under par. 12.3.4</p> <ul style="list-style-type: none"> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation
8	<p>Car rental, Train, Bus and Shuttle services: The service provider meets the requirements stipulated under par. 12.3.5</p> <p><i>No systems in place (Score=0)</i></p> <ul style="list-style-type: none"> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation

#	TECHNICAL EVALUATION CRITERION	COMMENTS
9	<p>Value Added Services: The service provider meets the requirements stipulated under par. 12.8</p> <ul style="list-style-type: none"> <li>• <i>No systems in place (Score=0)</i></li> <li>• <i>Some requirements are met and the service provider will not be able to make system modifications within 3 months (Score = 1)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Not all requirements are met, but the service provider will be able to customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Systems are in place to ensure 100% compliance with requirements (Score = 4)</i></li> </ul>	To be covered through presentation
10	<p>Additional charges for no-shows, changes to or cancellations of bookings/service/sectors. The service provider meets the requirements stipulated under par. 13.1.4</p> <ul style="list-style-type: none"> <li>• <i>The service provider does not comply with the above requirement(Score =0)</i></li> <li>• <i>The service provider comply with the above requirement (Score =4)</i></li> </ul>	To be covered through presentation

A bidder must receive at least 300 out of 400 points (75%) for Score Card 2A to proceed to Gate 3. The points received for each criteria will be calculated by averaging the scores awarded by each Bid Evaluation Committee member.

## Annexure A2: Part 2 (Online Tool)

#	TECHNICAL EVALUATION CRITERION	COMMENTS
1	<p>Par 12.4.1 – booking tool customisable to meet unique DPME requirements:</p> <ul style="list-style-type: none"> <li><i>The requirements cannot be met at all (Score=0)</i></li> <li><i>The requirements cannot be met within three months (Score = 1)</i></li> <li><i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li><i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li><i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on online tool
2	<p>Par 12.4.2 – Online tool access and security measures</p> <ul style="list-style-type: none"> <li><i>The requirements cannot be met at all (Score=0)</i></li> <li><i>The requirements cannot be met within three months (Score = 1)</i></li> <li><i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li><i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li><i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool
3	<p>Par 12.4.3 – Cost centre and approval setup</p> <ul style="list-style-type: none"> <li><i>The requirements cannot be met at all (Score=0)</i></li> <li><i>The requirements cannot be met within three months (Score = 1)</i></li> <li><i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li><i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li><i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool
4	<p>Par 12.4.4 – policy groups setup</p> <ul style="list-style-type: none"> <li><i>The requirements cannot be met at all (Score=0)</i></li> <li><i>The requirements cannot be met within three months (Score = 1)</i></li> <li><i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li><i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li><i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool



#	TECHNICAL EVALUATION CRITERION	COMMENTS
5	<p>Par 12.4.5 – Traveller profiles</p> <ul style="list-style-type: none"> <li>• <i>The requirements cannot be met at all (Score=0)</i></li> <li>• <i>The requirements cannot be met within three months (Score = 1)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool
6	<p>Par 12.4.6 – Approval flows / escalations setup</p> <ul style="list-style-type: none"> <li>• <i>The requirements cannot be met at all (Score=0)</i></li> <li>• <i>The requirements cannot be met within three months (Score = 1)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool
7	<p>Par 12.4.7 – Supporting documentation</p> <ul style="list-style-type: none"> <li>• <i>The requirements cannot be met at all (Score=0)</i></li> <li>• <i>The requirements cannot be met within three months (Score = 1)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool
8	<p>Par 12.4.8 – All services / sector listed can be booked online</p> <ul style="list-style-type: none"> <li>• <i>The requirements cannot be met at all (Score=0)</i></li> <li>• <i>The requirements cannot be met within three months (Score = 1)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool

#	TECHNICAL EVALUATION CRITERION	COMMENTS
9	Par 12.4.9 – Information available to booker / approver <ul style="list-style-type: none"> <li>• <i>The requirements cannot be met at all (Score=0)</i></li> <li>• <i>The requirements cannot be met within three months (Score = 1)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool
10	Par 12.4.10 – Invoicing data <ul style="list-style-type: none"> <li>• <i>The requirements cannot be met at all (Score=0)</i></li> <li>• <i>The requirements cannot be met within three months (Score = 1)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 3 months (Score = 2)</i></li> <li>• <i>Does not currently meet the requirement but service provider can customise their systems in order to meet all requirements within 1 month (Score = 3)</i></li> <li>• <i>Current system fully meets the requirement (Score = 4)</i></li> </ul>	To be covered through site visit testing on Online tool

## BIDDER DECLARATION (Section 22)

The bidder hereby declare the following:

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

- a. Act honestly, fairly, and with due skill, care and diligence, in the interests of [DPME];
- b. Employ effectively the resources, procedures and appropriate technological systems for the proper performance of the services;
- c. Act with circumspection and treat [DPME] 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 [DPME];
- f. Avoid fraudulent and misleading advertising, canvassing and marketing;
- g. Conduct business activities with transparency and consistently uphold the interests and needs of [DPME] as a client before any other consideration; and
- h. Ensure that any information acquired by the bidder(s) from [DPME] 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)*