



P.O Box 3613, Pietermaritzburg, 3200
 Treasury House, 145 Chief Albert Luthuli Street, Pietermaritzburg
 Tel: 033 897 4440 Fax: 033 341 0986
 Ref No. Bid 1253/2024-F

MINUTES OF THE COMPULSORY BRIEFING SESSION MEETING HELD ON 24 JULY 2024 AT 145 CHIEF ALBERT LUTHULI STREET PIETERMARITZBURG GROUND FLOOR BOARDROOM 1 FOR BID 253/2024-F: APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF TRAVEL MANAGEMENT FOR THE KWAZULU-NATAL PROVINCIAL TREASURY FOR A PERIOD OF THIRTY-SIX MONTHS

PRESENT:

Ms. A. Zondo	Chairperson
Ms. T. Makhathini	Supply Chain Management Representative
Ms. M Makhunga	Supply Chain Management - Secretariate
Mr. N Manyoni	Supply Chain Management - Secretariate
Ms. N. Khumalo	Supply Chain Management - Secretariate
Mr. M. Mzobe	Supply Chain Management - Secretariate
Mr. K. Mqadi	Bid Technical Evaluation Committee (BTEC) Representative
Ms. H. Naidoo	BTEC Representative
Ms. T. Selepe	BTEC Representative
Mr. T. Xolo	BTEC Representative
Dr. C. Rajah	BTEC Representative
Ms. N. Mlamula	BTEC Representative
List of Service Providers	Attached as Appendix A

1. OPENING AND WELCOME

Ms. A Zondo opened the meeting and welcomed all present. It was noted that the briefing session was compulsory, and it was mandatory for service providers to sign the attendance register as well as signing and stamping of Section D. Failure to adhere the requirements of the bid shall result to the offer considered as non-responsive.

The bid document was tabled, and the following was noted:

NO.	OVERVIEW OF THE BID DOCUMENT
1.	PAGES 1-6 OF THE BID DOCUMENT
	<p>It was noted that the aim of the bid was to invite prospective bidders to submit offers for the provision of travel and related services for KwaZulu-Natal Provincial Treasury. The service consists of air travel, accommodation, airport transfers, shuttle services and car rentals for a period of thirty-six months. This invitation was issued in terms of section 5 of the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000) and Preferential Procurement Regulations, 2022.</p> <p>1.1 The evaluation criteria consisted of four Phases:</p> <ul style="list-style-type: none"> a) Phase 1 – Supply Chain Administrative Compliance. b) Phase 2 - Mandatory Documents Required.



	<ul style="list-style-type: none">c) Phase 3 – Functionality Criteria.d) Phase 4 – Price and Preference Point System <p>1.2 It was noted that:</p> <ul style="list-style-type: none">a) The closing date for the bid was 8 August 2024 at 11:00am. Any bid received later than the stipulated date and time shall not be accepted.b) The bid document must be deposited in the bid box located at the ground floor Treasury House, KZN Provincial Treasury, 145 Chief Albert Luthuli Street, Pietermaritzburg, 3200. Telegraphic, telephonic, telex, facsimile, e-mail, and late tender proposals shall not be accepted. <p>Chairperson emphasised the importance of ensuring that all the required information must be contained in the bid submitted as bidders shall not be permitted to submit additional information that substantiate the offer post the closing date and time of the bid.</p> <p>Service providers were urged to use the table of contents as a checklist to ensure that the information supplied with the offer was complete. Furthermore, it was emphasized that the bid document was 63 pages long, and service providers were encouraged to ensure that their bid documents included all the pages.</p> <p>The bidders were requested to familiarise themselves with the definitions of the bid document, to understand how the terminology used in the bid document was interpreted.</p>
2.	STANDARD BIDDING DOCUMENTS – PAGES 7 TO 45
	<p>The following was noted:</p> <p>SBD 1- Part A: <u>Invitation to bid</u>: Chairperson emphasised that the supplier information must be duly completed.</p> <p>SBD 1 – Part B: <u>Terms and Conditions for bidding</u>: Bidders must read to understand the T&Cs outlined and it must be signed by an authorized person. Electronic signatures would be accepted.</p> <p>2.1 Section A – <u>Special Instruction and notice to bidders regarding the completion of bidding forms</u>: The Chairperson emphasised the following:</p> <ul style="list-style-type: none">a) Under no circumstances whatsoever may the bid forms be retyped or redraftedb) Bids shall be lodged at the address indicated in the bid document not later than the closing date and time specified and in accordance with the directives in the bid documents, no bid sent through the post office will be collected and no bid submitted by telefax, telegraphic or other electronic means will be considered.c) Any alteration made by the bidder must be initialled, and the use of correcting fluid was prohibited.d) Bidder must initial each page of the bid document. <p>2.2 Section B - <u>Registration on the Central Suppliers Database (CSD)</u>: Service providers must be registered on CSD.</p>



- 2.3 **Section C: Declaration that information on CSD is correct and up to date:** was for the declaration that the information on the CSD was correct and up to date.
- 2.4 **Section D – Compulsory Briefing Session:** The Chairperson emphasised that bidders attending the briefing session must ensure that Section D was signed and stamped by a representative from the KZN Provincial Treasury.
- 2.5 **Section E- SBD 3.1, Pricing Schedule (Firm Prices):** The pricing information required should be populated on pages 15-19 on the automated pricing schedule. The Chairperson handed over to Ms Naidoo to present the pricing instruction and completion of automated pricing schedule outlined on pages 14 to 19:
- The pricing Instruction outlined on page 14 must be used as a guide to complete the automated pricing schedule.
 - Pricing submission on pages 15 to 18 must be completed on **the green areas only**, as the orange areas had been populated by the KZN Provincial Treasury. The total amounts of all captured prices shall automatically add up on page 19 referenced as Price Declaration.
 - All forms must be completed in full.
 - The pricing schedule in an excel format would be circulated to bidders who attended the briefing session and **bidders must not edit or override the formulas issued with the bid.**
- 2.6 **Section F – SBD 4, Bidders Disclosures:** The Chairperson emphasised that bidders must complete and declare the information truthfully. It was also emphasised that on paragraph 2.3, bidders must declare by indicated yes or no and furnish (if applicable) whether their directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether they are bidding for this contract. Furthermore, bidders were cautioned to indicate the name of the signatory on paragraph 3 and ensure that the SBD 4 for was completed in fully as directed in the form. Failure to declare with honesty and failure to complete fully nullifies the offer submitted.
- 2.7 **Section G-The National Industrial Participation Programme:** was not applicable to Bid 1253/2024-F.
- Section H – SBD 6.1, Preference points claim form in terms of the preferential procurement regulations 2022:** The bid would be evaluated using the 80/20 preference point system. Bidders would not be eliminated for not completing and submitting the evidence that was required in SBD 6.1, however points for specific goals shall not be allocated. It was also emphasised that bidders must fully complete the form by indicating the number of points claimed and sign the form. Failure to submit the required evidence shall be interpreted to mean that preference points for specific goals were not claimed. Equity ownership shall be calculated based on the maximum number of points awarded for the equity ownership.
- Section I - Authority to Sign a Bid:** It was emphasised that bidders must complete and sign the form as the required information was in line with the provisions of the Company's Act. Section I must be completed by the signatory who had been authorised by the directors or members or as applicable in the firm.



	<p>2.8 Section J -<u>General Conditions of Contract</u>: Bidders were requested to read the general conditions and familiarize themselves with the contents thereof.</p> <p>2.9 Section K - <u>Special Conditions of Contract</u>: Bidders must ensure that they read through all the special conditions and the following were highlighted:</p> <ul style="list-style-type: none">a) Contract period would be thirty–six months.b) False Declaration or misrepresentation shall lead to disqualification.c) The Department intends to award the contract to 1 service provider.d) Equal offers shall be evaluated in line with the provisions of the Preferential Procurement Regulations, 2022.e) Communication, media releases etc.- Bidders must not communicate with the media unless permission had been granted by the Department.f) Communication with members of the bid committees was prohibited.g) Bid Appeal Tribunal (BAT) procedure lodge appeals was also highlighted. <p>2.10 Questions and Answers on Standard Bidding Documents:</p> <ul style="list-style-type: none">a) Since Section G was not applicable, so the service providers should not complete the form? <i>Yes, Section G was not part of the compulsory returnable, therefore must not be completed.</i>b) If there was an item that was not indicated on the pricing schedule as it was locked, could it be added in by the tenderer?<ul style="list-style-type: none">• <i>The automated pricing schedule must not be edited. However, service providers were at liberty to submit additional information which must be referenced properly to enable the Department to link the information submitted.</i>
3.	TERMS OF REFERENCE- PAGE 46 TO 63
	<p>The Chairperson highlighted the following:</p> <p>3.1 Introduction- The travel management services will be rendered for three sites; however the Department reserves the right to change the premises in terms of lease terminations that may occur during the contract period. Service providers would be advised appropriately on any changes that might occur in line with the conditions of contract. The successful service provider would enter into a Service Level Agreement (SLA) with the Department.</p> <p>3.2 General Service Requirements-</p> <ul style="list-style-type: none">a) Bidders were requested to familiarise themselves with the KZNPT Travel Policy published with the bid document and service providers were cautioned that the Department reserves the right to revise and amend its policies as and when deemed necessary, this shall be communicated in line with the conditions of contract.b) All invoices from travel suppliers must be consolidated and only one invoices must be submitted to the Department.c) Office hours refer to Monday to Friday from 07h30 to 16h15 and after hours refer to 16h16 to 07h29,



- d) All calls should be attended to expeditiously.
- e) The TMC should have a standard operating procedure for managing after-hours and emergency services. Requests that must be attended to within 24 hours and the successful service provider would be expected to render the service as such.
- f) The service must achieve significant cost savings for the KZNPT without the degradation of the service provided.

3.3 The Scope of Work- service providers were requested to read through the scope of work.

- a) Operational Requirements the following scope was highlighted -
 - Reservations: the TMC must obtain a minimum of three (3) price comparisons/quotations for all travel requests; Negotiate discounts on behalf of the Department and use the negotiated prices by National Treasury. The TMC should not earn any commission on prices negotiated by the National Treasury.
Air travel, accommodation, car hire and shuttle.
 - Communication: The TMC must conduct workshops and training sessions for all personnel involved and KZNPT shall provide the venue. The TMC should ensure sound seamless communication with all stakeholders and the TMC would be advised of all the stakeholders that they would communicate with.
 - Account management- was expected to respond to any queries and any information that might be required by the Department.
 - Monthly, Quarterly and Annual Travel Reviews- reports must be submitted to the super user of the Department.
 - The Department requires the account manager, travel consultant and the system's operations manager to ensure that the glitches in the system were attended to expeditiously and service delivery was not affected.

3.4 Evaluation Criteria

- a) **Phase 1 – Supply Chain Administrative Compliance:** The chairperson highlighted that the compulsory bid forms must be duly completed, stamped and signed (as required) and submitted with the bid. Failure to comply with the Supply Chain Administrative Compliance shall result in the offer considered as non-responsive and shall be rejected.
- b) **Phase 2 - Mandatory Requirements:** The Chairperson indicated that Phase 2 shall be evaluated into two Phases as highlighted below:
 - **Phase 2A – Membership Accreditation:** Bidders are required to submit a copy of Association of South African Travel Agents (ASATA) Membership and a copy of International Association of Travel Agents (IATA) Membership (Copy of document. Both these accreditations must be valid and failure to submit evidence the membership accreditation shall result in the offer considered non-responsive and shall be rejected.



- **Phase 2B – Compulsory Technical Documents:** Service provider must submit the proposal detailing how the TMC shall provide the service as per the criteria indicated in the terms of reference. It was also compulsory to label the information of the criteria as indicated in the tender document (Annexure A to L per criteria) and failure to reference properly shall be interpreted that the information was not submitted, and Department shall not make assumptions.

Bidders must submit proposals with the minimum information indicated in the tender document but not limited to the information required, bidders may add information. Failure to indicate the minimum information required and to submit all the Compulsory Technical Requirements shall result in the offer considered non-responsive and shall be rejected.

The chairperson also went through the minimum information required under each criterion amid reservations/ bookings, manage group bookings, directly negotiated rates, manage airline reservations, after-hours and emergency services, communication, account management, financial management, technology, management information and reporting, cost management, monthly, quarterly, and annual travel reviews and transition plan.

- c) **Phase 3- Functionality Criteria:** the minimum threshold for functionality was 36 points (65%) and the evaluation would be based on the following criteria:

- Travel management industrial experience- submit Annexure 1 which had been completed by the client confirming that a similar service was rendered by the bidder.
- Presentation would be conducted on the tendered online booking tool (OBT) - Bidders would be invited to demonstrate the tendered OBT on amid, managing all online bookings, managing group bookings, travel manager controls on reviews and approvals, reporting and data analysis as well as mobile application.

- d) **Phase 4-Price and Preference Points System:**

- The bid was issued with 80/20 preference points system wherein 80 points would be allocated for price and 20 points would be allocated for specific goals as follows:

Preference point system	
Price	80
Specific Goals	20
• Historical Disadvantage Person (HDP) – Black owned Enterprise	20
Total	100

- It was compulsory for bidders to substantiate the claim for specific goals requirements by submitting the following evidence:
 - Copy of Enterprise Registration Certificate (CIPC)
 - Copies of an identity document (ID) and CSD report to show /substantiate percentage ownership equity.



3.5 Questions and Answers on Terms of Reference:

- a) Was it only one consultant that the Department requires?
- *Required resources were listed on page 53 of the bid document and these includes accounts manager, travel consultant and system operations manager. What the company would have in their offices (internally) could not be dictated by the Department.*
- b) Should service providers submit the certificates for ASATA and IATA and receipts proof for payment?
- *No, bidders need to submit the accreditation certificates and the validity would be verified by the Department.*
 - *The Chairperson further elaborated that companies make mistakes of submitting certificates of a third-party not tendering for the bid, and the Department would have no legal relationship with the third-party. Therefore, bidders who submit a third-party certificate must also submit agreement that links the relationship of the parties and failure to submit the agreement shall nullify the offer.*
- c) What if companies were registered in a consortium and the accreditation certificate was not under the bidder for the tender but were in an existing agreement could the bidder submit that accreditation certificate?
- *Yes, the agreement of the consortium including all the relevant information must be submitted. Furthermore, details regarding Joint ventures or Consortium must be indicated in the bid document, (some of the conditions are indicated on Section K - Special Conditions of Contract clause 13 and 27). If the offer is submitted by a consortium, the name of the consortium must appear on CSD or any registration to would link the tenderer.*
- d) Do we need to submit all the proof of registration or submit one or the other?
- *No, you must submit all the proof of the accreditation as they serve different purposes.*
- e) Do you want to the list of all bed and breakfast facilities?
- *If possible, yes, the Department would like to see all that information as an addition as the Department has an obligation to support business entities owned by previously disadvantaged persons.*
- f) Do you need only one letter as indicated on Annexure 1?
- *Yes, one project indicating start and end date of the project as well as the rating of the service provided. One letter was required as per the industry norms.*

Presentation on the online booking tool:

Mr Mqadi emphasised that the presented tool must be a demo system not a live system as the Department would not be liable for the information shared incognisance of the applicable legislation.

4. Meeting Closure:

The Chairperson thanked all present and the meeting was adjourned at 11:20am.



Private Bag 3613, Pietermaritzburg, 3200
145 Chief Albert Luthuli Road, Pietermaritzburg, 3200
Tel: 033 897 4316
Name: Mr. N. Manyoni
Email address: Nqobani.Manyoni@kzntreasury.gov.za
Website: www.kzntreasury.gov.za

BID 1253/2024-F: APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF TRAVEL MANAGEMENT SERVICES FOR THE KWAZULU-NATAL PROVINCIAL TREASURY FOR A PERIOD OF THIRTY-SIX MONTHS
COMPULSORY BRIEFING SESSION MEETING

Date: 24 July 2024

Venue: Treasury House, 145 Chief Albert Luthuli Street, Ground Floor, Boardroom 1, PMB 3201

Time: 10h00 am

Company Name	Represented by:	Contact No.	Email address	Signature
XL Nexius Travel	Edward Maas	011 486 9000	nomusam@nexustravel.co.za	
Travel With Flair	Andile Ntaka	0861777380	twf802@twf.co.za	
Epitome Villa	Hlamalani Gudhuza	065 847 5304	epitomevilla@gmail.com	
Dub Travel	Deborah Sekeno	083 284 7655	deborah.sekeno@dubtravel.co.za	
IXperience Travelhaus	Lila Zondi	072 083 6832	indumizondi@icloud.com	
Ultimate Travel	Hemlitan Ledwaba	0768399940	hemlitan@matseKumo.co.za	



Private Bag 3613, Pietermaritzburg, 3200
145 Chief Albert Luthuli Road, Pietermaritzburg, 3200
Tel: 033 897 4316
Name: Mr. N. Manyoni
Email address: Nqobani.Manyoni@kznitresury.gov.za
Website: www.kznitresury.gov.za

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Date:

24 July 2024

Venue:

Treasury House, 145 Chief Albert Luthuli Street, Ground Floor,
Boardroom 1, PMB 3201

Time:

10h00 am

Company Name	Represented by:	Contact No.	Email address	Signature
TOURVEST TRAVEL	Vesna Noun	083 789 6173	vesna.noun@travel.co.za	
TOURVEST TRAVEL	Khuyiso Mahubela	083 617 3052	khuyiso.mahubela@travel.co.za	
TOURVEST TRAVEL	WONGA MATHEBESE	076 670 2932	wonga.mathebesere@travel.co.za	
TOURVEST TRAVEL	SHIREEN MOROPO	082 678 4099	shireen.moropo@travel.co.za	
TOURVEST TRAVEL	CHERYL BOODHOO	082 486 7355	cheryl.boodhoo@travel.co.za	
PSN TRAVEL FRENZY	NbokoZo Nhlaxo	065 930 6776	pretygn@psntravel.co.za	



Private Bag 3613, Pietermaritzburg, 3200
145 Chief Albert Luthuli Road, Pietermaritzburg, 3200
Tel. 033 897 4316
Name: Mr. N. Manyoni
Email address: Nqobani.Manyoni@kzntreasury.gov.za
Website: www.kzntreasury.gov.za

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Time: 10h00 am

Company Name	Represented by:	Contact No.	Email address	Signature
UMHLANGA EXPLORER	Bwane Balchand	084 658 2113	marketing@uexplore.co.za	<i>Balchand</i>
LINDA (YELLOW TRAVEL)	LINDA MATHAM	082 379125	Travel@yellowhattravel.co.za	<i>Linda</i>
City of Choice Travel	Jeevesh Nabin	081 350810	privates@coctravel.co.za jevesha@coctravel.co.za	<i>Jeevesh Nabin</i>
Let's Choose Better Spins Bawel		083 447 1967	accounts@letschoosetravel.co.za	<i>[Signature]</i>

