

## **ANNEXURE A – TERMS OF REFERENCE: APPOINTMENT OF TRAVEL MANAGEMENT AGENCIES (PANEL APPOINTMENT)**

In submitting their tenders, Bidders must respect all instructions, formats, terms of reference, contract provisions and specifications contained in this tender dossier. Failure to submit a tender containing all the required information and documentation within the deadline specified will lead to the rejection of the tender.

### **1. SERVICES TO BE PROVIDED**

The services required by the Bidder are described in the terms of reference, attached as Annexure B of this tender dossier.

Services will be rendered under a non-exclusive panel arrangement, as detailed in Annexure B

### **2. TIMETABLE**

Activity	Deadline date
Advertisement of Tender	20 January 2026
Compulsory Virtual Tender Briefing: <a href="https://teams.microsoft.com/join/33322482982704?p=aLaypf9RG4b2soQqF6">https://teams.microsoft.com/join/33322482982704?p=aLaypf9RG4b2soQqF6</a>	23 January 2026 @ 10:00
Deadline for Written Questions:	27 January 2026 @ 16:00
Soul City Response to Questions:	29 January 2026 @ 14:00
Tender Submission Deadline:	03 February 2026 @ 16:00
Bid Evaluation:	10-12 February 2026
Presentations	13 February 2026
Notification of Award / Regrets	13 February 2026
Contracting and Project Initiation	16 February 2026

### **3. PROPOSAL OFFER TO SOUL CITY**

The Bidder must provide one proposal, covering the followings sections:

- Technical Offer - in response to the terms of reference.
- Financial Offer- in response to the terms of reference.

#### 4. **EVALUATION PROCESS**

Evaluation of bids will be conducted in three (3) phases as follows:

Stage	Details
Phase 1	Eligibility / Pre-qualification criteria: The purpose of this criteria is to evaluate the bidders on their eligibility, largely based on their structure, organisational design, company documentation & declaration of interest.
Phase 2	Technical / Functional evaluation: The purpose of this criteria is to evaluate the bidders on their technical competencies.
Phase 3	Price and B-BBEE evaluation: The purpose of this criteria is to evaluate the bidders based on the bid price and B-BBEE status.

##### 4.1 **Phase 1: Pre-Qualification Process (Gate 0)**

Bidders will first be assessed against the pre-qualification (eligibility) requirements. Failure to submit any of the mandatory documents listed below will result in disqualification and exclusion from further evaluation.

ELIGIBILITY / PRE-QUALIFICATION CRITERIA
<ul style="list-style-type: none"><li>• Company Profile clearly describing services offered (travel, accommodation, conferencing)</li><li>• Proof of IATA and/or ASATA accreditation</li><li>• Confirmation that the bidder can operate without pre-payment and accept minimum 30-day payment terms.</li><li>• Valid Tax Clearance Certificate</li><li>• Valid B-BBEE Certificate or sworn affidavit</li><li>• Company Registration Documents (CK)</li><li>• Bank Letter (not older than 3 months)</li><li>• Proof of Business Address</li><li>• Signed Declaration of Interest Form (Annexure E)</li></ul>

##### 4.2 **Phase 2: Technical Evaluation (Gate 1) – [100 Points]**

The minimum qualifying score for functionality is 70 out of 100 points. Only bids that fail to achieve the minimum qualifying score on functionality shall not be considered for further evaluation on Price and B-BBEE.

*SOUL CITY reserves the right to invite shortlisted bidders to present their technical proposal and system demonstration, where applicable.*

TECHNICAL EVALAUTION CRITERIA				
	Evaluation Criteria	Description	Weight	Scoring Guide
1.	Understanding of Scope & Service Delivery Model	Understanding of requirements & proposed delivery model for travel, accommodation & conferencing, including donor compliance & 24/7 support.	35	<b>0–15:</b> Generic/unclear approach. <b>16–25:</b> Clear, structured approach. <b>26–35:</b> Fully defined, SCI-specific model.
2.	Systems Capability	Evaluation of online booking/approval system with project coding, reporting & POPIA compliance. Proof via demo link or screenshots required.	25	<b>0–10:</b> No proof provided. <b>11–18:</b> Functional system shown. <b>19–25:</b> Fully integrated system proven.
3.	Experience, Expertise & Capacity	Min. 7 years' travel management exp. for NGOs/complex corporates. Include team structure & three (3) client reference letters.	20	<b>0–8:</b> <7 years; inadequate team/references. <b>9–14:</b> 7-10 years; adequate team; 3 references. <b>15–20:</b> 10+ years' experience; strong team; excellent references.
4.	Reporting, Financial Controls & Compliance	Ability to deliver reconciled invoicing (project-coded), manage refunds, & provide donor-compliant audit reporting. Must provide sample invoice, process, & reports.	20	<b>0–8:</b> Weak/unclear; no proof. <b>9–14:</b> Adequate; basic samples. <b>15–20:</b> Strong, samples; proof provided.
<b>TOTAL</b>			<b>100</b>	

#### 4.3 Phase 3: Price & B-BBEE Evaluation (Gate 2) – [100 Points]

- 4.3.1. All bids that achieved the minimum qualifying score of 70 for functionality (acceptable bids) will be evaluated further in terms of price and B-BBEE, as follows:

PRICE AND B-BBEE SCORE	POINTS ALLOCATED
1.1 Price: Bidders must submit a comprehensive and detailed line-item (VAT-exclusive) budget; as well as proposed hours and rates of personnel involved with reference to different levels of proposed resources to be utilized and an estimate of recoverable expenses in line with price template on ANNEXURE C	80

1.2 The preference points, in terms of 4.4 will be awarded to bidders who provide valid proof of their B-BBEE status.	<b>20</b>
<b>TOTAL</b>	<b>100</b>

**4.3.2. Points allocated for pricing will be calculated as per the below evaluation criteria:**

Price evaluation formula	Points
$Ps = 80 \left( \frac{Pt - Pmin}{Pmin} \right)$	<b>80</b>

- **Ps = Points scored for price**
- **Pt = Price of bid under consideration**
- **Pmin = Lowest acceptable bid price**

**4.4 Broad-Based Black Economic Empowerment**

The below points will 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
1 – ≥50% Black Woman Owned	20
1 - Other	18
2	16
3	12
4	8
5	6
6	4
7	2
Level 8 or non-compliant	0

Original and valid B-BBEE status level verification certificate or a certified copy thereof, substantiating their B-BBEE rating issued by a verification agency accredited by the South African National Accreditation System ("SANAS"). In the case of Exempt Micro Enterprises (EMEs) and Qualifying Small Enterprises (QSEs), an affidavit is to be submitted.

**4.4.1** In the event of a Joint Venture or Consortium(s) / primary bidder with a subcontractor, the following requirements will apply:

- Bidders who wish to respond to this bid as a Joint Venture [JV] or consortium with B-BBEE entities / primary bidder with a subcontractor must state their intention to do so in their tender submission. Such bidders must also submit a signed JV / consortium / subcontracting agreement between the parties clearly stating the percentage [%] split of business (internal audit fee and work) and the associated responsibilities of each party.
- If such a JV or consortium / subcontracting agreement is unavailable, the directors must submit confirmation in writing of their intention to enter into a JV / consortium / subcontracting agreement should they be awarded business by SOUL CITY through this tender process. This written confirmation must clearly indicate the percentage [%] split of business (internal audit fee and work) and the responsibilities of each party. In such cases, before contracting, a signed copy of a JV / consortium / subcontracting agreement must be submitted to SOUL CITY.
- A consortium or joint venture must submit a valid consolidated B-BBEE Status Level verification certificate.

## **5. Submission of tenders**

Proposals are to be electronically submitted to [procurement@soulcity.org.za](mailto:procurement@soulcity.org.za) not later than the closing date which is the 03 February 2026 at 16:00.

No late proposals will be accepted and considered for evaluation. Soul City reserves the right to award the contract to one or more service providers.

## **6. Submission format**

Bidders must submit a single consolidated proposal in PDF format, with a maximum length of 10 pages, excluding annexures such as compliance documentation (e.g., CIPC, B-BBEE, Tax Clearance, portfolios, etc.). *All files submitted must be clearly labelled with the bidder's name and file content. Incomplete or unlabelled files/submissions may result in disqualification.*

## **7. Period during which tenders are binding**

Bidders are bound by their tenders for 45 days after the deadline for the submission of tenders.

## **8. Alteration or withdrawal of tenders**

Bidders may alter or withdraw their tenders by written notification prior to the deadline for submission of tenders. No tender may be altered after this deadline.

Any such notification of alteration or withdrawal shall be prepared and submitted in accordance with Paragraph 5.

## **9. Costs for preparing tenders**

No costs incurred by the tenderer in preparing and submitting the tender as well as attending the interview shall be reimbursable. All such costs shall be borne by the tenderer.

## **10. Ownership of tenders**

The contracting Authority retains ownership of all tenders received under this tender procedure. Consequently, Bidders have no right to have their tenders returned to them.

## **11. Confidentiality**

The entire evaluation procedure, from the drawing up of the shortlist to the signature of the contract, is confidential. The Bid Evaluation Committee's decisions are collective, and its deliberations are held in closed session.

*The evaluation reports and written records are for official internal use only and may not be communicated to either the Bidders or to any other party.*

## **12. Question Submission**

All questions relating to the tender must be submitted to [procurement@soulcity.org.za](mailto:procurement@soulcity.org.za)