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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), Exhibit 2

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

| Section No | Technical Criteria                                    | Reference page in Bidders Proposal | Comments   |
|------------|---|------------------------------------|--|
| 1.2        | Experience of the bidder                              | Exhibit 2: Page 9 to 12            | Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement. |
| 2.1        | Manage all reservations and bookings                  | Exhibit 2: Page 13 to 15           | Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement. |
| 2.2        | Manage all refunds and non-refundable airline-tickets | Exhibit 2: Page 17 to 20           | Bidder to summarise the motivation of compliance, partial compliance or non-compliance to the requirement. |

### RATING SCALE THAT BEC MEMBERS WILL USE

| Rating    | Definition   | Score    |
|-----------|--|----------|
| Excellent | <b>Exceeds</b> the requirement. Exceptional demonstration by the supplier of the relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services. Response identifies factors that will offer potential added value, with supporting evidence. | <b>5</b> |
| Good      | <b>Satisfies</b> the requirement with <b>minor additional benefits</b> . Above average demonstration by the supplier of the relevant ability, understanding, experience, skills, resource and  | <b>4</b> |

|                             |  |          |
|-----------------------------|--|----------|
|                             | quality measures required to provide the goods / services. Response identifies factors that will offer potential added value, with supporting evidence.  |          |
| <b>Acceptable</b>           | <b>Satisfies</b> the requirement. Demonstration by the supplier of the relevant ability, understanding, experience, skills, resource, and quality measures required to provide the goods / services, with supporting evidence.   | <b>3</b> |
| <b>Minor Reservations</b>   | Satisfies the requirement with <b>minor reservations</b> . Some minor reservations of the supplier's relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services, with little or no supporting evidence.                         | <b>2</b> |
| <b>Serious Reservations</b> | Satisfies the requirement with <b>major reservations</b> . Considerable reservations of the supplier's relevant ability, understanding, experience, skills, resource and quality measures required to provide the goods / services, with little or no supporting evidence.                       | <b>1</b> |
| <b>Unacceptable</b>         | <b>Does not meet the requirement.</b> Does not comply and/or insufficient information provided to demonstrate that the supplier has the ability, understanding, experience, skills, resource & quality measures required to provide the goods / services, with little or no supporting evidence. | <b>0</b> |

**Table 1: Functionality**

The Bidders will be evaluated according to the technical evaluation criteria in the scorecard below. Bidders who do not meet a minimum threshold of 60% for functionality will not be eligible to proceed to Gate 2 (Price and Preferential Goals).

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

| #  | TECHNICAL EVALUATION CRITERION  | WEIGHT                          | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
|--|---|---------------------------------|---------------------------|------------------------------------|----------|
| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |                                 |                           | TO BE COMPLETED BY THE BIDDER      |          |
| DESKTOP EVALUATION                           |   | 100                             |                           |                                    |          |
| 1  | GENERAL   | Total weight of section (1): 5% | REFERENCE IN BID DOCUMENT |                                    |          |
| 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.   | 2                               | Section 12.3.1 (j)        |                                    |          |
| 1.2  | Provide the reference letters from at least five (5) contactable existing/recent clients (within past 3 years) which are of a similar size to the dtic whom we may contact for references. The letter should include: 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 | 2                               | Section 12.3.1 (k)        |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION  | WEIGHT | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
|--|---|--------|---------------------------|------------------------------------|----------|
| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |        |                           | TO BE COMPLETED BY THE BIDDER      |          |
|  | the level of satisfaction.  |        |                           |                                    |          |
| 1.3  | The bidder must provide <b>the dtic</b> with the ASATA licence/ certificate (Association of South African Travel Agents). Proof of such membership must be submitted with the bid at closing date and time in order to be considered during evaluation. | 1      | Section 12.3.1 (L)        |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION   | WEIGHT                         | REFERENCE IN BID DOCUMENT  | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
|--|--|--------------------------------|--|------------------------------------|----------|
| TO BE COMPLETED BY THE TENDERING INSTITUTION |  |                                |  | TO BE COMPLETED BY THE BIDDER      |          |
| 2  | RESERVATIONS   | Total weight of section 2: 15% | REFERENCE IN BID DOCUMENT  |                                    |          |
| 2.1  | <b>Manage all reservations/ bookings.</b><br><br>Describe how all travel reservations/ bookings are handled e.g. hotel (accommodation); car rental; flights etc.<br><br>This will include, without limitation, an example of a detailed complex itinerary confirmation that includes air, car, hotel, passport requirement, confirmation numbers and additional proof of competency. | 3                              | <b>Section 12.3.2</b><br><br><b>Section 12.3.3</b><br><br><b>Section 12.3.4</b><br><br><b>Section 12.3.5</b> |                                    |          |
| 2.2  | <b>Manage group bookings.</b><br><br>Describe your capabilities for handling group bookings (e.g. for meetings, conferences, events etc.). Please specify if these bookings would be done by the TMC or outsourced.  | 3                              | <b>Section 12.3.2 (l)</b>  |                                    |          |
| 2.3  | <b>Directly negotiated rates</b><br><br>Negotiated airline fares, accommodation establishment rates, car rental rates, etc, that are negotiated directly or established by   | 3                              | <b>Section 12.3.2 (t)</b>  |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION   | WEIGHT | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
|--|--|--------|---------------------------|------------------------------------|----------|
| TO BE COMPLETED BY THE TENDERING INSTITUTION |  |        |                           | TO BE COMPLETED BY THE BIDDER      |          |
|  | <p>National Treasury or by <b>the dtic</b> are <b>non-commissionable</b>, where commissions are earned for <b>the dtic</b> bookings, all these commissions should be returned to <b>the dtic</b> on a quarterly basis.</p> <p>Describe how these specific rates will be secured. Describe any automated tools that will be used to assist with maintenance and processing of the said negotiated rates.</p>  |        |                           |                                    |          |
| 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 and how you manage the unused non-refundable airline tickets, your ability to secure special airline services for traveller(s) including preferred seating, waitlist clearance, special meals, travellers with disabilities, etc.√</p> | 3      | Section 12.3.3            |                                    |          |
| 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</p>   | 3      | Section 12.3.6            |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION   | WEIGHT                        | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
|--|--|-------------------------------|---------------------------|------------------------------------|----------|
| TO BE COMPLETED BY THE TENDERING INSTITUTION |  |                               |                           | TO BE COMPLETED BY THE BIDDER      |          |
|  | <p>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,</li> <li>- where it is located, centralized/ regionalised, in-country (owned)/ outsourced etc.</li> <li>- is it available 24/7/365</li> <li>- Reminders to <b>the dtic</b> to process purchase orders within 24 hours to reduce queries on invoices.</li> </ul> |                               |                           |                                    |          |
| 3  | COMMUNICATION  | Total weight of section 3: 5% | REFERENCE IN BID DOCUMENT |                                    |          |
| 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.</p>   | 5                             | Section 12.4              |                                    |          |



| #  | TECHNICAL EVALUATION CRITERION  | WEIGHT                         | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
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| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |                                |                           | TO BE COMPLETED BY THE BIDDER      |          |
| 4  | FINANCIAL MANAGEMENT  | Total weight of section 4: 10% | REFERENCE IN BID DOCUMENT |                                    |          |
| 4.1  | <p>Describe how you will implement the negotiated rates and maximum allowable rates established either by <b>the dtic</b> or the National Treasury.</p> <p>Describe how you will manage the 30-day bill-back account facility.</p> <p>Describe how pre-payments will be handled where it is required for smaller Bed &amp; Breakfast /Guest House facilities.</p> <p>Describe how invoicing will be handled, including the process of rectifying discrepancies between purchase orders and invoices, supporting documentation, reconciliation of transactions and the timely provision of invoices to <b>the dtic</b></p> <p>Please describe credit card reconciliation process, timing and deliverables.</p> | 10                             | Section 12.5              |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION  | WEIGHT                         | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
|--|---|--------------------------------|---------------------------|------------------------------------|----------|
| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |                                |                           | TO BE COMPLETED BY THE BIDDER      |          |
| 5  | TECHNOLOGY, MANAGEMENT INFORMATION AND REPORTING  | Total weight of section 5: 10% | REFERENCE IN BID DOCUMENT |                                    |          |
| 5.1  | <p>Describe the proposed booking system e.g. Global Distribution System (GDS), Online Booking Tool (OBT) or Self-Booking tool (SBT).</p> <p>Describe how travel consultants access and book web airfares i.e. non-GDS inventories (low cost carriers/ consolidators), and hotel web rates.</p> <p>Describe how you will manage data and management information such as traveller profiles, tracking of savings and missed savings, tracking of unused airline tickets, cancellation, traveller behaviour, transaction level data, etc. (refer to the detail in <b>Section 12.6.6</b>)</p> <p>Give actual examples of standard reports that you currently have available. Give an indication if reports can be customised.</p> <p>Provide a description of all technology and reporting products proposed for <b>the dtic</b></p> <p>Can the TMC comply with the <b>the dtic</b>'s monthly reporting requirement as prescribed by National</p> | 10                             | Section 12.6              |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION  | WEIGHT                        | REFERENCE IN BID DOCUMENT  | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
|--|---|-------------------------------|--|------------------------------------|----------|
| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |                               |  | TO BE COMPLETED BY THE BIDDER      |          |
|  | <p>Treasury? See Monthly Reporting Template prescribed by National Treasury Instruction No 3 of 2016/17.</p> <p>Describe the compatibility of your online solution to fully integrate into <b>the dtic's</b> ERP. Indicate the turnaround time to complete this process and a breakdown of the expected cost that will be associated with it (in case <b>the dtic</b> decide to integrate).</p>   |                               |  |                                    |          |
| 6  | ACCOUNT MANAGEMENT  | Total weight of section 6: 5% | REFERENCE IN BID DOCUMENT  |                                    |          |
| 6.1  | <p>Provide the proposed Account Management structure / organogram.</p> <p>Describe what quality control procedures/ processes you have in place to ensure that your clients receive consistent quality service.</p> <p>Describe how queries, requests, changes and cancellations will be handled. What is your mitigation and issue resolution process? Please provide a detailed response indicating performance standards with respect to resolving</p> | 5                             | <p>Section 12.7.1 and 12.7.2</p> <p>Section 12.7.3</p> <p>Section 12.7.4</p> |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION  | WEIGHT                               | REFERENCE IN BID DOCUMENT  | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
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| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |                                      |  | TO BE COMPLETED BY THE BIDDER      |          |
|  | <p>service issues. Complaint handling procedure must be submitted.</p> <p>What is in place to ensure that <b>the dtic's</b> travel Policy is enforced?</p> <p>How will you manage the service levels in the SLA and how will you go about doing customer satisfaction surveys?</p> <p>Indicate what workshops/training will be provided to Travellers and /or Travel Bookers.</p> |                                      | <p><b>Section 12.7.5</b></p> <p><b>Section 12.7.6</b></p> <p><b>Section 12.7.7</b></p> |                                    |          |
| <b>7</b>                                     | <b>VALUE ADDED SERVICES</b>   | <b>Total weight of section 7: 5%</b> | <b>REFERENCE IN BID DOCUMENT</b>   |                                    |          |
| 7.1  | Please provide information on any value-added services your company can offer.  | <b>5</b>                             | <b>Section 12.8</b>  |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION   | WEIGHT                         | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
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| TO BE COMPLETED BY THE TENDERING INSTITUTION |  |                                |                           | TO BE COMPLETED BY THE BIDDER      |          |
| 8  | COST MANAGEMENT  | Total weight of section 8: 10% | REFERENCE IN BID DOCUMENT |                                    |          |
| 8.1  | Describe your detailed strategic cost savings plan for the contract duration. What items do you target for maximum cost savings results?<br><br>Describe how you will assist <b>the dtic</b> to realise cost savings on annual travel spend. | 10                             | Section 12.9              |                                    |          |
| 9  | QUARTERLY AND ANNUAL TRAVEL REVIEWS  | Total weight of section 9: 5%  | REFERENCE IN BID DOCUMENT |                                    |          |
| 9.1  | Provide a sample of a Quarterly and Annual review used for performance management during the life cycle of the contract.   | 5                              | Section 12.10             |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION  | WEIGHT                         | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
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| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |                                |                           | TO BE COMPLETED BY THE BIDDER      |          |
| 10   | OFFICE MANAGEMENT   | Total weight of section 10: 5% | REFERENCE IN BID DOCUMENT |                                    |          |
| 10.1   | <p>Provide an overview of your back-office processes detailing the degree of automation for air tickets workflow, ground arrangements and bill back workflow.</p> <p>Describe roles and responsibilities of assigned staff. Please provide the management hierarchy.</p> <p>Describe type of training provided to travel agency personnel</p> <p>Describe the forecasting system employed to staff operations in response to volume changes owing to conferences, project-related volumes, etc.</p> | 5                              | Section 12.11             |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION   | WEIGHT                          | REFERENCE IN BID DOCUMENT  | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
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| TO BE COMPLETED BY THE TENDERING INSTITUTION |  |                                 |  | TO BE COMPLETED BY THE BIDDER      |          |
| 11   | ON-LINE BOOKING TOOL (OBT)   | Total weight of section 11: 15% | REFERENCE IN BID DOCUMENT  |                                    |          |
| 11.1   | <p><b>Manage all Online bookings</b></p> <p>Provide the Online Travel Request Booking process flow on the OBT (Online Booking Tool)</p> <p>Demonstrate how you will link the Travel Requests into an automatic Order Number?</p> <p>Demonstrate how you will set up the OBT to National Treasury Negotiated rates on the OBT for all categories.</p> <p>Demonstrate how you provide full access to View new negotiated rates on the OBT.</p> <p>(Online Book Tool) for Compliance.</p> | 5                               | <p>Section 12.3.2(a)</p> <p>Section 12.3.2(b)</p> <p>Section 12.3.2(c)</p> <p>Section 12.5.1</p> <p>Section 12.6.2</p> |                                    |          |

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| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |        |   | TO BE COMPLETED BY THE BIDDER      |          |
| 11.2   | <b>OBT Travel Manager Review and Line Manager Approvals</b><br><br>Describe your approval process for Travel Bookings by Travel Booker.<br><br>1. Review of Quote by Travel Coordinator for Policy Compliance<br><br>2. Approval of Booking by Line Manager.<br><br>Describe how a Travel Reviewer and Line Manager can reject out of policy Bookings.<br><br>Describe how Notification's workflows will be received for approvals. | 5      | <b>Section 12.3.2(c)</b><br><br><b>Section 12.3.2(d)</b><br><br><b>Section 12.4.3</b> |                                    |          |



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| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |                                |  | TO BE COMPLETED BY THE BIDDER      |          |
| 11.3   | <b>Safety &amp; Risk / Duty of Care</b><br><br>Describe a Module within your Online Booking for Traveller Safety and Risk Management e.g., Real time Traveller Alert and Communication.<br><br>Describe travel Application (Mobile App) to help mitigate risk and are as flexible and agile as the rapidly changing travel climate. | 5                              | <b>Section 12.8.1</b><br><br><b>Section 12.8.2</b><br><br><b>Section 12.8.3</b><br><br><b>Section 12.8.5</b> |                                    |          |
| 12   | <b>REPORTING AND DATA ANALYTICS (OBT)</b>   | Total weight of section 12: 5% | REFERENCE IN BID DOCUMENT  |                                    |          |
| 12.1   | <b>Describe your on-demand data and insights into your travel activity:</b><br><br>1. Full visibility of Travel Spend;<br><br>2. Identify behavioural traveller;  | 5                              | <b>Section 12.10.1</b><br><br><b>Section 12.10.2</b>   |                                    |          |

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| TO BE COMPLETED BY THE TENDERING INSTITUTION |  |        |                           | TO BE COMPLETED BY THE BIDDER      |          |
|  | Trends;<br><br>3. AI reporting Capabilities;<br><br>4. Dashboard View and<br>Conversion to Reporting<br>Format e.g., Excel or PDF;<br><br>5. Out of Policy Bookings Trail;<br><br>6. Missed Savings;<br><br>7. Spend per Category;<br><br>8. Flight Spend;<br><br>9. Accommodation Spend;<br><br>10. Car Rental Spend;<br><br>11. Conference/Events Spend and<br><br>12. Shuttle and Transfer Spend. |        |                           |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION  | WEIGHT                         | REFERENCE IN BID DOCUMENT  | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
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| TO BE COMPLETED BY THE TENDERING INSTITUTION |   |                                |  | TO BE COMPLETED BY THE BIDDER      |          |
| 13.  | TRAVELLER MOBILE APPLICATION (OBT)  | Total weight of section 13: 5% | REFERENCE IN BID DOCUMENT  |                                    |          |
| 13.1   | <p><b>Describe your Mobile Application that can do the following:</b></p> <p>1. Traveller Messaging;</p> <p>2.Approval Request for Managers on Mobile;</p> <p>3.Traveller Itinerary and Booking Confirmations;</p> <p>4. Urgent Alert and Traveller Safety Information and</p> <p>5. Full Traveller booking Confirmation function by Travel Booker and Travel Manager for Confirmed Bookings.</p> | 5                              | <p>Section 12.3.2(a)</p> <p>Section 12.8.2</p> <p>Section 12.8.3</p> <p>Section 12.8.6</p> <p>Section 17</p> |                                    |          |

| #  | TECHNICAL EVALUATION CRITERION | WEIGHT | REFERENCE IN BID DOCUMENT | REFERENCE PAGE IN BIDDERS PROPOSAL | COMMENTS |
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| TO BE COMPLETED BY THE TENDERING INSTITUTION |                                |        |                           | TO BE COMPLETED BY THE BIDDER      |          |
|  | Total                          | 100    |                           |                                    |          |
|  | Threshold                      | 60%    |                           |                                    |          |

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