TERMS OF REFERENCE

NT012-2026

APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR EVENTS MANAGEMENT FOR A PERIOD OF THREE (3) YEARS

NON-COMPULSORY VIRTUAL BRIEFING SESSION TO BE HELD:

10 NOVEMBER 2026 (MICROSOFT TEAMS)

CLOSING DATE AND TIME OF BID

27 NOVEMBER 2026 AT 11H00

BID VALIDITY PERIOD:

90 DAYS

national treasury
Department:
National Treasury
REPUBLIC OF SOUTH AFRICA

A NATION THAT WORKS

2030 NDP

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LIST OF ABBREVIATIONS

ABBREVIATION	FULL NAME
BAC	Bid Adjudication Committee
BEC	Bid Evaluation Committee
B-BBEE	Broad-Based Black Economic Empowerment
CIPC	Companies and Intellectual Property Commission
CSD	Central Supplier Database
NT	National Treasury
PPR 2022	Preferential Procurement Regulation 2022
QSE	Qualified Small Enterprise
RSA	Republic of South Africa
SLA	Service Level Agreement
SARS	South African Revenue Service
SCC	Special Conditions of Contract
SBD	Standard Bidding Document
VAT	Value Added Tax

DEFINITIONS

Name	Definition
Customer	A participant on the contract who procures goods and/or services from the appointed Supplier(s).
Delivery	The process of transporting goods from a bidder's source location to a predefined destination by the participants.
Due Diligence	The investigation or exercise of care that the State conducts before entering into an agreement with the bidders to validate the bid responses.

Table 1: Bid Document Checklist and Returnable

#	Document Name[1]	Included in the published bid document?	To be returned by bidder?	Bidder to tick Yes if document is submitted
PHASE 1: ADMINISTRATIVE AND OTHER STANDARD BIDDING REQUIREMENTS				
1.	SBD 1 Invitation form to bid	Yes	Yes	
2.	SBD 4 Declaration of Interest	Yes	Yes	
3.	Full CSD report	No	Yes	
4.	CIPC documents	No	Yes	
5.	Curriculum Vitae	No	Yes	
6.	Copies of qualifications	No	Yes	
7.	Signed teaming agreement	No	If Applicable	
8.	Valid Tax Clearance Certificate and/or SARS-issued pin code	No	Yes	
9.	Consolidated Central Supplier Database Registration (CSD) full report in the case of a joint venture	No	If Applicable	
PHASE 2: FUNCTIONALITY				
10.	Bidder must submit supporting documents. Minimum threshold of 65 % must be achieved	No	Yes	
PHASE 3: PRICE & SPECIFIC GOALS				
11.	Proof of specific goals requirements	No	Yes	

SECTION A: INTRODUCTION AND TERMS OF REFERENCE

1. DESCRIPTION AND FORMAT OF THE BID

1.1 This bid is for the appointment of panel of service providers for events management for a period of three (3) years

1.2 This bid document is structured as follows:

- Section A : Introduction and Terms of Reference
- Section B : Conditions of Bid
- Part 1 : Evaluation Criteria
- Part 2 : Additional Bid Requirements
- Part 3 : Recommendation and Appointment of Bidders
- Section C : Conditions of Contract

2. LEGISLATIVE AND REGULATORY FRAMEWORK

2.1 This bid and all contracts emanating there from will be subject to General Conditions of Contract issued in accordance with Treasury Regulation 16A published in terms of the Public Finance Management Act, 1999 (Act 1 of 1999) (PFMA) as well as the Preferential Procurement Policy Framework Act 2000 (PPPFA) with its latest 2022 regulations.

2.2 The Special Conditions of Contract (SCC) are supplementary to that of General Conditions of Contract (GCC). However, where the Special Conditions of Contract conflict with the General Conditions of Contract, the Special Conditions of Contract prevail.

3. DURATION OF CONTRACT

3.1 The contract shall be for a period of three (3) years.

4. BRIEFING SESSION

4.1 A non-compulsory virtual briefing session will be held as follows:

Venue : TEAMS

Date : 10 November 2026

Link : https://teams.microsoft.com/meet/3235862915925157?p=YLsPA3WErnsilp8ANc

Time : 10:00 – 11:00

4.2 The bid information session is not compulsory but will provide bidders with an opportunity to obtain clarity on certain aspects of the procurement process as set out in this bid document.

4.3 The National Treasury reserves the right to answer questions at the briefing session and/or to respond formally after the briefing session.

5. TERMS OF REFERENCE

5.1 Technical Specifications

Table 2: Summary of Technical Specifications

Introduction of the division	Scope of work and expected outputs	Required areas of expertise	Contract
Background of division and purpose of the TORs	Scope of work	Expected expertise	High level of contract conditions

5.2 Background of the division and purpose of the Terms of Reference

5.2.1 The Economic Policy International Cooperation (EPIC) Division of the National Treasury is responsible for economic policy analysis, economic reform and advancing South Africa's economic and financial interests through engagements with regional and international partners and institutions.

5.2.2 As part of this mandate, the Division coordinates and supports South Africa's participation in, and hosting of, a range of high-level national and international meetings, conferences and related engagements. These include engagements associated with the World Economic Forum (WEF), BRICS, the African Caucus, the New Development Bank (NDB), multilateral development institutions and other bilateral and multilateral forums.

5.2.3 These engagements vary in scale and complexity and may require the coordination of venues, delegate and stakeholder logistics, transport, accommodation-related logistics, catering, audio-visual requirements, branding, registration, protocol support, communications, side events and other event-related services.

5.2.4 Given the scale, complexity and international profile of certain events, National Treasury requires access to suitably qualified and experienced event-management service providers to supplement its internal capacity and provide specialised event-management and logistical support as and when required.

5.2.5 National Treasury will retain overall responsibility for the strategic direction, governance, approvals and oversight of each event. The appointed service provider will perform its functions under the direction of the designated National Treasury project manager or Logistics Lead.

5.3 Scope of work

5.3.1 This bid is for the appointment of a panel of suitably qualified and experienced service providers to provide event-management services and related logistical support services to the EPIC Division for a period of three (3) years, as-and-when-required basis.

5.3.2 Appointment to the panel does not guarantee any service provider a minimum value, volume or number of assignments during the contract period.

5.3.3 Each assignment will be initiated through an authorised National Treasury process and will be subject to an agreed scope of work, deliverables, timelines, approved costs and the issuing of the necessary official order before services commence.

5.3.4 The successful bidder will be required to provide events management services include but not limited to,

1. **Project and event Management**

- Coordinate the planning and execution of meetings, conferences, workshops, side events, dinners and other related engagements from initiation to close-out.
- Coordinate agreed workstreams, suppliers and stakeholders, ensuring that dependencies, deliverables, deadlines and responsibilities are clearly identified, tracked and managed.
- Coordinate planning meetings, site visits, rehearsals, dry runs, final venue and facilities checks, and post-event reviews.
- Develop and maintain an event-specific risk register and contingency plan and promptly escalate material risks to National Treasury.
- Provide appropriate on-site project management and staffing throughout the duration of the events.
- Develop detailed event programmes, schedules and running orders and ensure that activities are executed in accordance with the approved project plan and agreed timelines.
- Provide regular progress reports at intervals determined by National Treasury.
- Work alongside the National Treasury Logistics Lead to evaluate event outcomes, obtain feedback from attendees and stakeholders, and identify areas for improvement

2. **Logistics and Operational Support**

- Collaborate with relevant National Treasury internal teams, including Communications Services, Security Management, Supply Chain Management, Financial Management and Facilities Management, as well as external suppliers and stakeholders, to coordinate event requirements.
- Support the planning and coordination of main event, side events, including dinners, receptions and other related engagements.
- Advise on, arrange, source and make appointment of service providers for transportation, shuttle services, entertainment, artists/performers, lanyards, stationery, gifts, branding items and other event collateral, as required.
- External service providers would only be utilised where internal capacity is unavailable or insufficient.
-

5.3.4.1 Coordinate virtual and physical meetings on-site logistics, including venue election, setup, layouts, décor, branding, registration desks, printing and attendee services.

- Coordinate final checks of venues, facilities and event infrastructure prior to commencement of each event.
- Provide, perform and complete the quality services in a proper, efficient and prompt manner and in accordance with the project specifications and contract requirement in terms of the agreement.
- Ensure compliance and adhere to safety & risk measures including:
  - **Safety plan:** Developing a disaster management plan and hiring security when required
  - **Regulations:** Ensuring compliance with health and safety regulations
  - **Liability Insurance:** Providing necessary liability insurance

- **Safety officer** as and when required
- **Structural or civil engineer** as and when required

- Identify potential operational risks associated with large-scale events and recommend appropriate mitigation measures.
- Allocate adequate human resources and ensure sufficient staffing for the planning and execution of the events.
- Ensure that all logistical arrangements are aligned with the approved event programme, protocol and National Treasury requirements.

3. **Hiring of event equipment**
   - Audiovisual equipment
   - Lightings Equipment
   - Tents, tables and chairs
   - Plants and décor
   - Podiums/stages
   - Sound Systems
4. **Event Production, Décor and Audiovisual**
   - Coordinate and arrange/procure audiovisual requirements for meetings and events, in consultation with the appointed audiovisual service provider and National Treasury.
   - Design, supply/procure, install, operate and remove mood lighting, where required.
   - Design, supply/procure, install and dismantle décor for:
     - Registration desks;
     - Arrival areas;
     - Pre-drink/reception areas;
     - Main event venues and plenary halls;
     - Breakaway rooms;
     - Dining areas, including table linen, floral features, table numbers, napkins, underplates and centrepieces;
     - VIP holding rooms; and
     - Dressing rooms for performers/artists.
   - Ensure that all necessities associated with the décor and design including floral arrangement, table setting, lighting, drapery, branding and event styling are appropriate to and complement the approved theme and objectives of the event.
   - Coordinate rehearsals, technical checks and dry runs to ensure the readiness of audiovisual, lighting, décor and other production elements.

5. Communications, Public Relations, Advertising and Media Support

The National Treasury Communication Services unit in line with the EPIC unit will develop and implement communication plans for events, and retain overall responsibility for the approvals and oversight of all communication related items for each event, while the service provider shall provide the following support:

- Support the implementation of the communication plan for the event/s.

5.3.4.2 Public relations which entail reputation management and stakeholder relations, advertising and promotions of the event. No advertising or promotional placement may be booked without prior written approval from the National Treasury Communication Services and responsible unit.

- Media management which includes assisting with media registration, managing registration lists, and media monitoring.
- Event evaluation which entails compiling reports after studying public opinion, researching audiences, planning communication campaigns, tracking media coverage, and measuring whether PR activities improved awareness of the event. This will also entail compiling all media clips of media coverage of the event, analysing the tone of the coverage, and recommending communication approaches for future events.
- Support the promotion of the event by securing advertising slots on traditional, commercial, community and social media platforms (Radio, TV, Billboards, Online, newspapers and social media) Support with marketing materials, and website and social media content. For community media advertising slots, the service provider together with Communications Unit to engage the Government Communication and Information System (GCIS) media-buying unit may negotiate better rates with community media platforms.
- Support social media event activity which entails livestreaming event sessions that are approved for streaming on the NT platforms, monitoring online conversations on the event, creating digital campaigns, compiling reports containing an analysis of uploaded social media content and audience reach.
- Develop and provide approved event-related communication and marketing collateral. the service provider may package content were requested but shall not independently distribute to the Division without consultation and approval from National Treasury Communication Services.
- Prepare materials as and when required such as flyers, infographics, social media banners, animated videos, posters, brochures, banners, programmes, badges and more.
- Provide agile batches of edited, high-quality photographic and media assets for immediate PR and communication use during the events.
- Provide comprehensive and appropriately governed media galleries and related media assets following the events. The right of use still remains with the department.
- Ensure that all public-facing communication materials are aligned with National Treasury and Government communication protocols and branding requirements.
- Ensure that all visual outputs, branding and public-facing collateral undergo a mandatory second-eye review and quality assurance process before release or use.
- Crisis communication plan. National Treasury will develop and implement a crisis communication plan, which will include immediate addressing of misinformation and

disinformation through daily rapid response meetings. The service provider will offer support in the implementation, where required.

6. **Financial and Cost Management**

- Ensure efficient, effective and economical utilisation of the allocated event budget while maintaining the required quality and standards.
- Develop and maintain a comprehensive Costing Matrix providing full line-item transparency for all event-related costs.
- Regularly update the Costing Matrix to reflect approved changes, commitments, actual expenditure and projected costs.
- Negotiate with venues, suppliers and vendors to secure favourable pricing, terms and cost savings, where appropriate.
- Identify opportunities for cost efficiencies and value-for-money solutions without compromising the quality, security or effectiveness of the events.
- Ensure that no financial commitments are made without the required approval.
- Submit all proposed financial negotiations, reallocations, variations or changes to the National Treasury Project Manager for formal review and approval before commitments are made.
- Provide regular financial updates as part of the overall project reporting.

5.4 **The required areas of expertise**

5.4.1 Appointed service providers must collectively demonstrate capacity in experienced:

5.4.1.1 Event and project-management leadership;

5.4.1.2 Planning and execution of large and complex national and international events;

5.4.1.3 Management of high-level and VIP engagements;

5.4.1.4 Coordination of multiple stakeholders and concurrent workstreams; venue, delegate, transport, hospitality and on-site logistical management;

5.4.1.5 Supplier and subcontractor coordination; budget management, costing and commercial negotiation;

5.4.1.6 Risk identification, contingency planning and crisis response;

5.4.1.7 Event technology and virtual or hybrid event capability;

5.4.1.8 Event-related creative, branding and communications support where required;

5.4.1.9 Mobilisation of suitable personnel at short notice and outside normal working hours where required;

5.4.1.10 Appropriate quality-assurance and reporting systems.

5.4.2 Each appointed service provider must have sufficient organisational capacity to deploy an appropriate team for each assignment. National Treasury may require the service provider to identify the proposed team, roles, responsibilities and level of effort before an assignment is approved.

5.4.3 The service provider must appoint a Team Leader/Project Manager who meets the minimum requirements specified in the technical evaluation criteria and who will serve as the primary point of contact for National Treasury throughout the contract period.

5.4.4 **Core Competencies and Skills**

The designated Team Leader/Project Manager must demonstrate the following competencies:

1. Project and Event Management

- Strong ability to manage multiple tasks, projects and priorities simultaneously.
- Excellent organisational and coordination skills to ensure the successful planning and execution of conferences, meetings and events.
- Ability to work under pressure and meet tight deadlines whilst maintaining a high standard of quality and professionalism.

2. Communication and Stakeholder Management

- Excellent communication and interpersonal skills, with the ability to build and maintain effective relationships with stakeholders, suppliers, service providers and attendees.
- Strong customer service and stakeholder management skills, providing professional and responsive support before, during and after events.
- Excellent teamwork and collaboration skills, with the ability to work effectively across multidisciplinary teams.

3. Technical and Professional Skills

- Proficiency in event management software, virtual event platforms and other relevant technologies used in conference and event management.
- Strong attention to detail to ensure all planning, logistical and operational requirements are effectively managed.
- Strong negotiation skills, including the ability to secure favourable terms and value-for-money arrangements with suppliers and service providers.
- Creative problem-solving and decision-making abilities to address operational challenges and unforeseen circumstances effectively.
- Knowledge of current industry trends, best practices and innovations in conference and event management.

4. Availability and Flexibility

- Ability and willingness to travel when required.
- Ability to work flexible hours, including evenings, weekends and public holidays where necessary.

5.4.5 **Relevant Experience**

The Team Leader/Project Manager and proposed team must demonstrate proven experience in the following areas:

1. Conference and Event Management

- Planning, coordinating and managing national and international conferences, meetings, workshops, seminars and related events.
- Planning, coordinating and managing in-person, virtual and hybrid events.
- Managing large-scale events involving multiple stakeholders, service providers and workstreams.

2. Cultural and Formal Events

- Planning and managing national and international cultural events.

- Planning and managing gala dinners, cocktail functions, receptions, awards ceremonies and other formal engagements.

3. **Strategic Communication and Visibility**
   - Raising the profile and visibility of organisations through events, conferences and public engagements.
   - Developing and implementing event communication and promotional strategies using:
     - Social media platforms;
     - Digital media;
     - Print media;
     - Promotional and branding material; and
     - Other communication channels.

4. **Creative and Multimedia Services**
   - Editing, layout and design.
   - Graphic design.
   - Digital and electronic media design.
   - Photography and video production.
   - Event branding and visual communication services.

5.4.6 National Treasury will maintain a hands-on approach throughout the contract. As such, the successful service providers will liaise closely with the Lead of Logistics/project manager of that specific project. Maintaining a trusted and sound working relationship will be key to the success of this contract. Confidentiality is a priority, and the service provider/s will be required to sign a non-disclosure agreement (NDA) before any work commences.

5.5 **Level of effort**

5.5.1 Bidders must provide separate rates for the different categories and levels of services identified in the Pricing Schedule. Rates must distinguish, where applicable, between senior project/event-management services; event coordination services; administrative and logistical support; on-site event support; creative and communications services; and specialist or technical services.

5.5.2 The applicable category estimated level of effort and authorised personnel will be agreed for each assignment before work commences.

5.5.3 National Treasury will not be liable for time or services exceeding the approved assignment or official order unless the additional work has been approved in writing through the applicable National Treasury process.

5.6 **Contract requirements**

The contract will comprise the following areas of responsibility:

5.6.1 Delivery of the highest standard in terms of quality, timeous delivery and within budget.

5.6.2 **Sub-contracting**

- A service provider may utilise approved subcontractors where specialised services are required, subject to the terms of the contract and prior approval by National Treasury where required.

- The appointed service provider shall remain fully responsible and accountable for the performance, quality, conduct and delivery of any work performed by its subcontractors.
- The utilisation of a subcontractor shall not create any contractual relationship between National Treasury and that subcontractor unless National Treasury expressly enters into such an agreement through an authorised procurement process.

5.6.3 **National Treasury's oversight role**

- National Treasury will retain a hands-on oversight role in each assignment. The appointed service provider shall report to and work under the direction of the designated National Treasury project manager or Logistics Lead.
- Material decisions relating to scope, expenditure, suppliers, programme changes, branding, communications or other matters identified by National Treasury shall be subject to prior National Treasury approval.

5.6.4 **Electronic files and ownership of work**

- All final artwork, designs, images, video, templates, reports and other materials produced specifically for National Treasury under an assignment must be provided to National Treasury in the final usable format and, where applicable, in an editable/source format through a secure electronic transfer mechanism or repository approved by National Treasury.
- The service provider shall ensure that National Treasury receives the rights necessary to use, reproduce, adapt and retain material specifically commissioned and paid for under the contract, subject to any pre-existing third-party intellectual property rights expressly disclosed and agreed to by National Treasury. A very high standard of quality and professionalism at all times.

5.6.5 **Work Allocation**

5.6.5.1 Work will be allocated among the appointed panel members in accordance with a competitive Request for Quotation (RFQ) process and bid conditions. The successful bidder(s) will be expected to provide services as and when required and acknowledges that their appointment with the panel does not guarantee allocation of work. This allocation will consider the pricing submitted in response to each RFQ and allocation of work and the outcomes of any applicable price negotiations.

5.6.5.2 The work allocation shall always be undertaken in a manner that is fair, transparent, competitive and consistent with applicable National Treasury supply chain management requirements.

5.6.6 **Contractual Terms and Conditions**

- The service providers are be expected to enter into a Master Service Agreement (MSA) for the participation in the panel.

5.6.6.2 The service providers may be expected to enter into a Service Level Agreement (SLA) or provided with the purchase order as contractual agreement or Contract Form with the National Treasury to perform all functions as set out in the project Specification or Terms of Reference.

- The National Treasury may enter into a generic Service Level Agreement (SLA) with the selected service providers. The purpose of the SLA is to enable monitoring, evaluation and compliance with the agreed Terms of Reference.

5.7 **Invoicing and Payments**

5.7.1.1 The service provider should be aware that National Treasury only pays after the services have been rendered, any other arrangements would be considered an exception and would need to be agreed with the department prior.

- Payments will be done within 30 days of receipt of an invoice with all required supporting documents as per the Service Level Agreement.
- Payments will be made by the Department after the service provider has submitted an invoice supported by all requisite documents.

5.7.1.2 In terms of Treasury Regulations, the National Treasury cannot make advance payments, however on exceptional cases based on agreeable terms. Payments will be made only upon work completed. Bidders should have the appropriate financial-capacity to execute the scope of work.

SECTION B: CONDITIONS OF BID

6. PART 1: EVALUATION CRITERIA

6.1 The details of the evaluation phases are outlined below:

Table 2: Evaluation Criteria

Phase 1	Phase 2	Phase 3
Administrative and other standard bidding Requirements	**Functionality Requirements**	**Price and Specific Goals**
Compliance with legislative and other bid requirements	Minimum threshold of 65%	Bidders that meet the minimum threshold of 65% will qualify to be appointed on the panel and will be subjected to price and specific goals during the RFQ process.

6.2 **Phase 1: Administrative and other standard bidding documents**

6.2.1 Administrative Requirements

6.2.2 It is also a requirement for bidders to submit the other legislative documents as detailed below.

6.2.3 SBD 1 invitation form to bid.

6.2.4 SBD 4 bidder's disclosure.

6.2.5 Central Supplier Database – A Central Supplier Database report must be submitted

6.2.6 CIPC documents

6.2.7 Curriculum Vitae (CV) for Project Manager.

6.2.8 Copies of qualification(s).

6.2.9 All foreign qualifications must be accompanied by a South African Qualifications Authority (SAQA) certificate of evaluation. Failure to provide that will result in allocation of the lowest score.

6.2.10 Shareholding portfolio by proof of registration of the company with Companies Intellectual Property Commission. An additional document detailing the shareholding of the bidder in an organogram format in support of the proof of company registration must be submitted by bidders at the closing date and time.

6.2.11 **Failure to submit the documents indicated above even after the bidder has been notified and given a maximum of seven calendar days to rectify may invalidate the bid.**

6.3 **Phase 2: Functionality Evaluation**

6.3.1 During this phase, bidders' responses will be assessed based on functionality. To form part of the panel, bidders must achieve a minimum total score of **65%** for the functional requirements. **Failure to meet the minimum functionality threshold will result in disqualification.**

6.3.2 Bidders are required to submit supporting documentation for all functional requirements as part of their bid submission. The Bid Evaluation Committee (BEC) will assess and score each bid based solely on the submitted documentation and the information provided. Failure to provide adequate supporting documents may result in a lower functionality score.

6.3.3 Each criterion will be assigned a score, which will then be multiplied by the designated weighting for that criterion. The total score will be calculated by summing these weighted scores and expressing the result as a percentage of the highest possible score. Bidders are encouraged to ensure that their submissions are complete and clearly demonstrate compliance with the functional requirements.

Table 3: Functionality Evaluation

	EVALUATION CRITERIA	WEIGHT	SCORING CRITERIA
1	**Proven Track Record** Three (3) Contactable reference letters with the service rendered within the past ten (10) years (2016 – closing of the bid date). The reference letters should be: • In the client's letterhead • Indicate the description of the service rendered, • Indicate the actual dates of the contract – start and end date. • Reference letters should be dated and signed by the client/s. Furthermore, a completion certificate and/or purchase order and/or SLA must be aligned with the reference letter submitted. NB: The reference letter/PO/Booking Confirmation/completion certificate/SLA should indicate all the requirements mentioned above and will be considered. Failure to supply the required documents as per the criteria will result in allocation of the lowest score. ***Qualifier: The letter should state all the points above; failure to comply with the letter/s above will not be accepted. Incomplete or ongoing projects will not be considered. Where an extension has been granted, the bidders must have completed the term of the initial contract.***	15	5 = 5 or more reference letters with 5 or more PO or Booking Confirmation or Completion Certificate or SLA aligned with the reference letter submitted. 4 = 4 reference letters with 4 PO or Booking Confirmation or Completion Certificate or SLA aligned with the reference letter submitted. 3 = 3 reference letters with 3 PO or Booking Confirmation or Completion Certificate or SLA aligned with the reference letter submitted. 2 = 2 reference letters with 2 PO or Booking Confirmation or Completion Certificate or SLA aligned with the reference letter submitted. 1 = 1 reference letter with 1 PO or Booking Confirmation or Completion Certificate or SLA aligned with the reference letter submitted
2	**Qualification:** The project manager / team lead must have qualification(s) in the following areas: • event management, • hospitality, • communications, • public relations, or • equivalent or related field	15	**5** = Any qualification above Degree/BTech/Advanced diploma (NQF 8+) **4** = Degree/ BTech /Advanced Diploma (NQF 7) **3** = National Diploma or advanced certificate (NQF 6) **2** = Any qualification at NQF level 5 **1** = Any qualification below level 5
3	***Project Manager / Team Lead Professional Experience*** The project manager / team lead must have a minimum of 10 years' relevant event management experience. A comprehensive CV must be attached as per Annexure D, listing all projects managed/led with contactable references.	15	**5 = 15** or more years **4 = 11** to 14 years **3 = 10** years **2 = 5** to 9 years **1 = less** than 5 years
4	***International Professional Experience*** The organisation/company must demonstrate a proven track record in managing international and high-profile events. **Compliance requirements**: Examples of past events, detailing size, nature and scope, Reference letters and/or Signed Service Level Agreement	20	5 = Managed 5 or more international/high-profile events 4 = Managed 4 international/high-profile events 3 = Managed 3 international/high-profile events 2 = Managed 2 international/high-profile events

	EVALUATION CRITERIA	WEIGHT	SCORING CRITERIA
	(SLA) and/or purchase order(s) and/or booking confirmation(s). The reference letters should contain the following: Description of the project, Client name, Client contact (i.e., email or office number), Period and should be on the client's letterhead and signed.		1 = Managed 1 international/high-profile event
5	***Technological Integration:*** The service provider must demonstrate their use of event management software tools and technologies through screenshots of the tools and technologies. Showcase innovative solutions for enhancing participant experience (e.g., mobile apps, virtual reality tours etc). *Should further information be required, service provider would be contacted.*	20	**5= 5** or more tools and/or technologies demonstrated **4= 4** tools and/or technologies demonstrated **3= 3** tools and/or technologies demonstrated **2= 2** tools and/or technologies demonstrated **1= 1** tool and/or technology demonstrated
6	***Online events experience:*** Number of events or meetings conducted online (e.g., workshops or conferences). Bidders to provide reference letters of online events conducted online and list online platforms used. *Qualifier: Letters with less than 50 participants will receive the lowest score. Each letter should reflect at least 50 participants.*	15	5 = Co-planned/Led planning and management of 5 or more online meetings/events (e.g. workshops or conferences) with at least 50 and more participants. 4 = Co-planned/Led planning and management of four (4)online meetings/events (e.g. workshops or conferences) with at least 50 and more participants. 3 = Co-planned/Led planning and management of three (3) online meetings/events (e.g. workshops or conferences) with at least 50 and more participants. 2 = Co- planned/Led and managed (two (2) online meetings/events (e.g. workshops or conferences) with at least 50 participants. 1 = Co- planned/Led and managed one (1)/ no online meeting (e.g. workshop or conference) with at least 50 or less participants.
	Total	100	
	THRESHOLD	**65%**	

6.4 **Phase 3: Price and Specific Goals**

6.4.1 *Preference Point System*

6.4.2 **The appointed panel of service providers will be invited to participate in the quotation process. Quotations will be evaluated in accordance with the applicable preference point system, namely 80/20 or 90/10 and its bid conditions, depending on the estimated value of the procurement and the approved budget allocation.**

6.4.3 The pricing evaluation will be in terms of regulation 4 and/or 5 of the Preferential Procurement Regulations pertaining to the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), responsive bids will be adjudicated by the State on the 80/20 and/or 90/10 preference point system and its procurement regulations.

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

$$Ps = 80\left(1 - \frac{Pt - P\min}{P\min}\right) \text{ and/or } Ps = 90\left(1 - \frac{Pt - P\min}{P\min}\right)$$

Where,

Ps = Points scored for comparative price of bid under consideration

Pt = Comparative price of bid under consideration

Pmin = Comparative price of lowest acceptable bid

6.4.5 ***Applicable Taxes***

6.4.5.1 All bid prices must be inclusive of all applicable taxes.

6.4.5.2 Failure to comply with this condition may invalidate the bid.

6.4.5.3 All bid prices must be inclusive of fifteen percent (15%) Value Added Tax.

6.4.5.4 Failure to comply with this condition may invalidate the bid.

6.4.6 *Points Scored for Specific Goals*

6.4.6.1 The following formular will be used to calculate the points for specific goals:

$$PSSG = MPA\ X \frac{POE}{100}$$

Where,

PSSG = Points scored for specific goals

MPA = Maximum points allocated for a specific goal

POE = Percentage of equity ownership by an HDI

6.4.7 *Proof of equity ownership and related matters*

6.4.7.1 The specific goals contemplated in paragraph 6.5.9.1 above must be equated to the percentage of an enterprise or business owned by individuals or, in respect of a company, the percentage of a company's shares that are owned by individuals, who are actively involved in the management of the enterprise or business and exercise control over the enterprise, commensurate with their degree of ownership at the closing date of the tender.

6.4.7.2 In the event that the percentage of ownership contemplated in paragraph 6.5.9.1 above changes after the closing date of the tender, the tenderer must notify the Office, and such tenderer will not be eligible for any preference points.

6.4.7.3 Preference points may not be claimed in respect of individuals who are not actively involved in the management of an enterprise or business and who do not exercise control over an enterprise or business commensurate with their degree of ownership.

6.4.7.4 All claims made for specific goals must be considered according to the following criteria:

- Equity in private companies must be based on the percentage of equity ownership, and
- Preference points may not be awarded to public companies and tertiary institutions.

6.4.7.5 Equity claims for a Trust may only be allowed in respect of those persons who are both trustees and beneficiaries and who are actively involved in the management of the Trust,

6.4.7.6 Documentation to substantiate the validity of the credentials of the trustees contemplated in paragraph 6.5.10.5 above must be submitted to the Office.

6.4.7.7 A consortium or Joint Venture may claim points for specific goals, based on the percentage of the contract value managed or executed by individuals who are actively involved in the management or exercise control of the respective parties of the consortium or Joint Venture.

6.4.7.8 A tenderer must submit proof of its ownership.

6.4.7.9 A tenderer who does not submit proof of their ownership may not be disqualified from the bidding process, but they score points out of 80/20 and/or 90/10 for price and zero (0) points out of 80/20 and/or 90/10 for specific goals.

6.4.7.10 Preference points may not be claimed in respect of individuals who are not actively involved in the management of an enterprise or business and who do not exercise control over an enterprise or business commensurate with their degree of ownership.

6.4.8 Specific Goals

6.4.8.1 The following will be used to calculate the points for specific goals.

6.4.8.2 The government intends to promote the following goals with this bid, and the points to be allocated are indicated against each goal:

Table 5: Preference Point System (80/20 points system)

#	Specific goals	Score	Required proof/ documents to be submitted for evaluation purposes
1.	**The company owned by black people** • 100% company owned by black people = 5 points • 75% - 99% company owned by black people = 3 points • 60% - 74% company owned by black people = 2 points	5 points	**Proof of claim as declared on SBD 6.1 (one or more of the following will be used verifying the tenderer's status:** • Company Registration Certification/document (CIPC) • Company Shareholders certificate • Certified identification documentation of company director/s

#	Specific goals	Score	Required proof/ documents to be submitted for evaluation purposes
	• 51%- 59% company owned by black people = 1 points • 0 - 50% company owned by black people = 0 point		• CSD report/ CSD registration number (MAAA number) • B-BEE Certificate of the tendering company. • Consolidated B-BBEE certificated if the tendering company is a Consortium, Joint Venture, or Trust (Issued by verification agency accredited by the South African Accreditation System). • Agreement for a Consortium, Joint Venture, or Trust.
2.	**The company owned by Women.** • 100% company owned by women = 5 points • 75% - 99% company owned by women = 3 points • 60% - 74% company owned by women = 2 points • 51%- 59% company owned by women = 1 points • 0 - 50% company owned by women = 0 points	5 points	
3.	**The company owned by people who are Youth.** • 100% company owned by Youth = 5 points •75% - 99% company owned by Youth = 3 points •60% - 74% company owned by Youth = 2 point •51%- 59% company owned by Youth = 1 point •0 - 50% company owned by Youth = 0 point	5 points	
4	**The company owned by people who are disabled.** • 100% company owned by people who are disabled = 5 points • 75% - 99% company owned by people who are disabled = 3 points • 60% - 74% company owned by people who are disabled = 2 point • 51%- 59% company owned by people who are disabled = 1 point 0 - 50% company owned by people who are disabled = 0 point	5 points	

Table 6: Preference Point System (90/10 points system)

#	Specific goals	Score	Required proof/ documents to be submitted for evaluation purposes
1.	**The company owned by black people** • 100% company owned by black people = 5 points • 75% - 99% company owned by black people = 3 points • 60% - 74% company owned by black people = 2 points • 51%- 59% company owned by black people = 1 points • 0 - 50% company owned by black people = 0 point	5 points	**Proof of claim as declared on SBD 6.1 (one or more of the following will be used verifying the tenderer's status:** • Company Registration Certification/document (CIPC) • Company Shareholders certificate • Certified identification documentation of company director/s • CSD report/ CSD registration number (MAAA number) • B-BEE Certificate of the tendering company. • Consolidated B-BBEE certificated if the tendering company is a Consortium, Joint Venture, or Trust (Issued by verification agency accredited by the South African Accreditation System). • Agreement for a Consortium, Joint Venture, or Trust.
2.	**The company owned by people who are disabled.** • 100% company owned by people who are disabled = 5 points • 75% - 99% company owned by people who are disabled = 3 points • 60% - 74% company owned by people who are disabled = 2 point • 51%- 59% company owned by people who are disabled = 1 point 0 - 50% company owned by people who are disabled = 0 point	5 points	

7. PART 2: ADDITIONAL BID REQUIREMENTS

TERMS AND CONDITIONS

7.1 **Counter Conditions**

7.1.1 **For purposes of constituting the panel, National Treasury reserves the right to appoint a maximum of ten (10) bidders, ranked according to their final functionality scores.**

7.1.2 Bidders' attention is drawn to the fact that amendments to any of the bid conditions or setting of counter conditions by bidders may result in the invalidation of such bids.

7.1.3 The National Treasury reserves the right to change or supplement any information or to issue any addendum to this bid before the closing date and time. The National Treasury and its officers, employees and advisors will not be liable in connection with either the exercise of, or failure to exercise this right.

7.1.4 **Work will be allocated among the appointed panel members through a competitive quotation process among appointed panel members as and when required.**

7.1.5 **The work allocation shall always be undertaken in a manner that is fair, transparent, competitive, cost effective and consistent with applicable National Treasury supply chain management requirements.**

7.1.6 If the National Treasury exercises its right to change or supplement information in terms of the above clause, it may seek amended bid documents from all bidders.

7.2 **Fronting**

7.2.1 The National Treasury 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 the National Treasury does not support any form of fronting.

7.2.2 The National Treasury, 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 this bid document. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade, Industry and Competition, be established during such enquiry / investigation, the onus will be on the bidder to prove that fronting does not exist.

7.2.3 Failure to do so by the bidder within a period of fourteen (14) days from date of notification by National Treasury may invalidate the bid / contract and may also result in the restriction of the bidder to conduct business with the public sector for a period not exceeding ten (10) years, in addition to any other remedies the National Treasury may have against the bidder concerned.

7.3 **Right Of Award**

7.3.1 The State reserves its following rights –

7.3.2 Not to make any award in this bid or accept any bids submitted,

7.3.3 Appoint more than one service provider(s) during the request for quotation process,

7.3.4 Request further technical information from any bidder after the closing date,

7.3.5 Verify information and documentation of the bidder(s),

7.3.6 To withdraw or amend any of the bid conditions by notice in writing to all bidders prior to closing of the bid and post award, and

7.3.7 If an incorrect award has been made to remedy the matter in any lawful manner it may deem fit.

8. THIRD PARTY AGREEMENTS AND SUB-CONTRACTOR AGREEMENTS

8.1 No agreement between the bidder and any third party will be binding to the State.

8.2 In the event that bidder intends using sub-contractors to execute the Contract or part thereof, the bidder must note that it shall remain responsible and accountable for the completion of the work or delivery of services requirements.

8.3 The bidder must declare its intention to subcontract and the percentage of subcontracting thereof and must provide full description of the subcontractor.

9. SUBMISSION OF BIDS

9.1 **Online bid submission**

9.2 Bidders must submit their bids online through the e-Tender Publication portal.

9.3 Manual or hardcopy bids are not acceptable.

9.4 The online e-Tender publication portal can be accessed on the following link: https://www.etenders.gov.za/

9.5 The guide for online bid submission is attached as Annexure D.

9.6 Bidders to adhere to all the rules for the online bid submission.

9.7 Bidders' attention is drawn to the sequential submission format as per the checklist on Table 1.

9.8 Non-compliance with online bid submission WILL invalidate the bidder's response.

9.9 Submit all bid queries via email to NTAdministrativetenders@treasury.gov.za.

10. COMMUNICATION AND CONFIDENTIALITY

10.1 The Economic Policy International Cooperation Chief Directorate (EPIC) Division may communicate with bidders where clarity is sought after the closing date and time of the bid and prior to the award of the contract, or to extend the validity period of the bid, if necessary.

10.2 Any communication to any State official or a person acting in an advisory capacity for the State in respect of this bid between the closing date and the award of the bid by the bidder is discouraged.

10.3 Whilst all due care has been taken in connection with the preparation of this bid, the National Treasury makes no representations or warranties that the content in this bid or any information communicated to or provided to bidders during the bidding process is, or will be, accurate, current, or complete. The National Treasury, and its officers, employees and advisors will not be liable with respect to any information communicated which is not accurate, current, or complete.

10.4 If a bidder finds or reasonably believes it has found any discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by the National Treasury (other than minor clerical matters), the bidder must promptly notify the National Treasury in writing of such discrepancy, ambiguity, error or inconsistency in order to afford the National Treasury an opportunity to consider what corrective action is necessary (if any).

10.5 Any actual discrepancy, ambiguity, error or inconsistency in this bid or any other information provided by the National Treasury will, if possible, be corrected and provided to all bidders without attribution to the bidder who provided the written notice.

10.6 All communication between the bidder and the National Treasury office must be done in writing as per the Contact Details below.

10.7 No representations made by or on behalf of the National Treasury in relation to this bid will be binding on the National Treasury unless that representation is expressly incorporated into the contract ultimately entered between the National Treasury and the successful bidder(s).

10.8 All persons (including all bidders) obtaining or receiving this bid and any other information in connection with this 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 response to this bid.

11. CONTACT DETAILS

11.1 **Bid Enquiries:** All enquiries should be in writing to NTAdministrativetenders@treasury.gov.za. The closing date for receipt of all enquiries is **10 days** before the date of closure. All enquiries beyond the closing date will not be considered.

12. PART 3: RECOMMENDATION AND APPOINTMENT OF BIDDERS

12.1 Once the evaluation process is complete there will be a recommendation report by the BEC to the Bid Adjudication Committee (BAC) who has the authority to either support (recommendation) or not support (recommendation) the recommendation/s to the Director General for appointment/s.

12.2 On approval of the recommendation/s and appointment/s, the successful bidder(s) will sign an acceptance letter together with the Service Level Agreement for events management services for period of three (3) years.

12.3 Once the successful bidder(s) has been appointed/awarded they cannot do a cession to waive or cede without consultation with the department.

12.4 **Consent of information**

12.4.1 By submitting a bid, the bidder consents in terms of the Protection of Personal Information Act, 2013 (Act 4 of 2013) (POPIA) to the State processing personal information contained in the bid (including information relating to the bidder and its directors/members/trustees/employees/agents/subcontractors, as applicable) for purposes of administering and evaluating the bid, conducting verification and due diligence (including checks with CSD, SARS, CIPC, banks, references and other third parties), concluding and managing any resulting contract, and meeting legal/governance obligations; the bidder warrants that it is authorised to provide such information and may be required to furnish additional information within a reasonable time frame determined by the department, and acknowledges the data subject rights under POPIA and that queries may be directed to the contact person in this bid document.

12.5 **Tax compliance requirements**

12.5.1 It is a condition of this bid that the tax matters of the successful bidder(s) are in order, or that satisfactory arrangements have been made with South African Revenue Service (SARS) to meet the bidder's tax obligations.

12.5.2 The Tax Compliance status requirements are also applicable to potential foreign bidders / individuals who wish to submit a bid.

12.5.3 It is a requirement that bidders grant a written confirmation when submitting this bid response that SARS may on an on-going 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.

12.5.4 Bidders are required to be registered on the Central Supplier Database (CSD) and National Treasury shall verify the bidder's tax compliance status through the CSD or through SARS.

12.5.5 Where Consortia / Joint Ventures / Sub-Contractors are involved, each party must be registered on the CSD, and their tax compliance status will be verified through the CSD or through SARS.

12.6 **Negotiations**

12.6.1 The State reserves the right to negotiate with the shortlisted bidders prior or post award. The terms and conditions for negotiations will be communicated to the shortlisted bidders prior to invitation to negotiations. This phase is meant to ensure value for money is achieved through the measure of quality that will assess the monetary cost of the goods or services against the quality and or benefits of that goods or services.

12.7 **Due diligence**

12.7.1 The State reserves the right to:

12.7.1.1 Conduct due diligence during the evaluation process to determine the ability of the bidder to honour contractual obligations that might emanate from this tendering process. The due diligence is not only limited to the bidder but to all parties the bidder might have confirmed to do business with for the fulfilment of the contract that might be awarded.

12.7.1.2 Conduct due diligence prior to final award or at any time during the contract period and this may include pre-announced/ non-announced site visits. During the due diligence process the information submitted by the bidder will be verified and any misrepresentation thereof may disqualify the bid in whole or parts thereof.

12.7.1.3 Conduct any evaluation verifications prior to final award or at any time during the contract term period.

SECTION C: CONDITIONS OF THE CONTRACT

13. CONTRACTS

13.1 Refer to General conditions of Contract attached as Annexure A

13.2 Furthermore, Special Conditions of Contract (SCC) are supplementary to that of General Conditions of Contract (GCC). However, where the Special Conditions of Contract conflict with the General Conditions of Contract, the Special Conditions of Contract prevail.

END