

# Request for Proposals: Travel Management Services

## 1. What we are seeking:

The CGIAR System Organization (SO) is seeking to appoint a Travel Management Company (TMC) that can provide comprehensive travel management services to meet our global business travel needs.

The contract will cover the provision of travel management, and related services and shall include, but not limited to: airline and rail ticketing, booking and related services (airport transfer, hotel reservations, visa services, travel insurance, car rental) at cost-effective rates for the CGIAR System Organization.

The successful company will be appointed for an initial period of one (1) year renewable. Subsequent renewals will be subject to satisfactory performance on the contract. Prospective bidders should review the requirements listed below to determine their eligibility. All eligible firms are encouraged to participate.

## 2. Who we are:

CGIAR is a global research partnership whose mission is to create a world with sustainable and resilient food, land, and water systems that deliver diverse, healthy, safe, sufficient, and affordable diets and ensure improved livelihoods and greater social equality within planetary and regional environmental boundaries. One CGIAR is a dynamic reformulation of CGIAR's partnerships, knowledge, assets, and global presence, aiming for greater integration and impact in the face of the interdependent challenges facing today's world. As One CGIAR, scientific innovations for food, land, and water systems can be deployed faster, at a larger scale, and at a reduced cost, having a greater impact where they are needed the most. This will provide its beneficiaries worldwide with more sustainable ways to grow, catch, transport, process, trade, and consume safe and nutritious food.

The CGIAR System Organization is an international organization headquartered in Montpellier, France. The System Organization has a vital role in facilitating and overseeing the development, effective and efficient implementation of the CGIAR 2030 Research and Innovation Strategy. The System Organization enters into agreements with the trustee of the CGIAR Trust Fund, Funders, Centers, and other relevant entities for funding CGIAR Research and other activities of the CGIAR System. The Organization is committed to cultivating a work environment that reflects teamwork, gender equality, and respect for diversity. We endeavor to foster a multicultural environment that is free of any form of harassment and discrimination; and that

embraces and values individuals regardless of age, ethnicity, race, gender, national or social origin, marital status, or any other form of personal identity.

Please find more information about CGIAR at [www.cgiar.org](http://www.cgiar.org)

### 3. Purpose of the RFP:

The purpose of the RFP is to appoint a Travel Management Company (TMC) that can provide comprehensive travel management services to meet our global business travel needs. The successful company will be appointed for an initial period of one (1) year renewable annually for an additional 2 years subject to satisfactory performance on the contract.

### 4. Scope and Deliverables:

The scope will cover the provision of travel management, and related services and shall include, but not be limited to the following:

#### 4.1 Specific Services:

##### Reservation and Ticketing

Booking and ticketing domestic and international air, rail, and other travel from the CGIAR System Organization.

- Prepare itineraries, formal quotations and issue tickets on the main airlines operating the route, based on the CGIAR System Organization travel policy, including advice of baggage and ticket restrictions, travel times, and other relevant trip details.
- Provide Charity fares when available.
- Air tickets shall be issued only on approved ticket stock of the International Air Transportation Association (“IATA”) or ticket stock of recognized, reputable airlines as approved by the SO.
- Link TMC’s travel management system to the International SOS Travel tracker.

##### Travel Advisory Services:

- Provide travel information on countries to be visited, including visa (based on the traveler’s profile) and inoculation requirements.

##### Support:

- Provide 24/7 live support, 365 days a year in English
- Proven excellence in customer service and response times during and after business hours.

##### Travel Management:

- Provide SAP Concur as the online booking tool with the ability to customize the SO travel policy and approval workflows.
- Provide a simple offline booking solution
- Booking and reservation of accommodations using the Global Distribution System (GDS) and other channels providing the best rates available.

- Able to integrated with SAP Concur expense management system .
- Provide highly personalised services for complex travel booking.
- Able to partner with International SOS to use the TravelTracker tool for security purposes

#### Reporting and Reviews:

- Produce monthly and annual reports of transactions, including itinerary, tickets issued, refunds, unused tickets, and other travel information.
- Produce additional finance reports upon request.
- In conjunction with CGIAR System Organization staff, conduct periodic reviews of information related to TMC performance and booking practices, and suggest process adjustments.

#### Account Management:

- A dedicated Account Manager, who is proactively engaged in problem-solving, identifying cost savings solutions, and able to guide the SO on best practices and industry benchmarks.
- Proved ability to accurately track trip information throughout the life of the booking, including email threads, documents, etc.
- Use of credit cards Business Travel Accounts (BTA).

#### Other optional services:

- Visa arrangements and support services.
- Management of loyalty programs.
- Group bookings.
- Provide services of organization of business meetings and conferences.

## 4.2 Deliverables

Through the travel management company, CGIAR System Organization seeks to achieve the following important business benefits:

- Excellent customer service.
- Adherence to multiple travel policies/regulations.
- Reduced paperwork burden for travelers and travel approvers, improved online tools.
- Improved efficiency around travel activities (traveler and administrative).
- Cost savings (direct travel costs and indirect human resource costs).
- Increased travel benefits (through participation in a corporate level business frequent flyer programs).

Our estimated travel budget is between \$1M and \$1.5M per annum.

## 5. RFP Schedule and Dates:

The following schedule includes key milestones and associated completion dates and is provided primarily for planning purposes. The CGIAR System Organization may modify the project timeline at its discretion.

Milestone	Indicative dates
RFP Issued	23 March 2023
End of inquiry period for RFP clarification (bidder)	29 March 2023
Response to inquiries shared and FAQs published on CGIAR website	03 April 2023
Extended deadline for submission of proposals	20 April 2023
Shortlisted bidders' presentation	02/03 May 2023
Service provider selected and informed	05 May 2023
Agreement with service provider signed	w/c 08 May 2023

## 6. How to submit a proposal:

Please submit a technical proposal and a budget proposal electronically as two separate documents to [smo-bidding@cgiar.org](mailto:smo-bidding@cgiar.org) to be received no later than **Thursday 20 April 2023, midnight, Paris time**. Both documents can be attached to the same email.

The technical proposal will consist of no more than 10 pages using Microsoft Word or a similar format, font size 11pt., margins no smaller than one-inch.

The budget proposal will be presented using Microsoft Excel or a similar format and consist of, at a minimum, the following line items: consultant time, resources, travel. The budget will be presented in US dollars.

## 7. Eligibility, Qualifications and Capabilities:

- The TMC must:
  - be registered by IATA (Attached copy of IATA Certification)
  - Have experience providing similar services to International Organizations, NGOs, Embassies and other Multinational Organizations.
  - Have at least three (3) years of operations.
  - Ability to offer Concur as an online booking tool
  - Demonstrate that the composition and professional capabilities of the proposed team are suited to the scope of work; dedicated team of expert travel agents who are are fluent in English.
- Provide at least three (3) references for current contracts with contact names, email addresses, and phone details.
- Ability of the firm to expand the scope of services and/or provide global services.

## 8. Evaluation Criteria:

The evaluation process to determine the successful firm will involve both qualitative and quantitative elements. All proposals submitted will be reviewed and evaluated on a two-step basis in the context of the overall value it brings to CGIAR. The technical and commercial proposals are assessed separately in the first round and then combined with presentations to determine the best value for the price.

The Evaluation Criteria to select the service provider will be as follows:

Technical Proposal: 50%

- Quality and completeness of proposal;
- Capability, areas of expertise, relevant experience and resources;
- Clarity of bidders proposed approach and strategies;

Cost: 40%

- Clarity of proposed fee structure
- Value added

Presentation and /Itinerary exercise 10% (for shortlisted firms)

The CGIAR System Organization reserves the right to determine in its absolute discretion whether any proposal meets the minimum standards of a complete proposal, and whether to approach an applicant to provide additional information

## 9. Proposal Content:

The **Technical Proposal** should include:

### Company profile

- Provide a brief description of the TMC including history, years in business, total sales and overview of client base, specifically any experience with INGOs
- Please provide the name, title, e-mail address, and telephone number of primary contact of the bidder
- Describe your office locations and types (full service, on-site, etc) including affiliate relationships
- Describe your experience and capabilities with organizing group travel. Include information on recent activity regarding the group size, destination and overview of services provided.

### Travel Management Services

- List the Global Distribution System (GDS) supported by your TMC
- What is your experience with on-line booking tools? Do you offer proprietary tool(s) or function as a system integrator (lease of OBT, etc.)? Demonstrate your ability to successfully support an OBT for large clients and to rapidly achieve improved adoption rates.
- What have your past/present clients, similar in size and scope of the CGIAR, experienced

as an average adoption rate of SAP Concur OBT? For those clients that have high online adoption, what has driven the adoption rate?

- d) CGIAR requires the OBT to display the widest variety of airfares offered, including non-GDS subscribing carriers and any other channels providing the best rates. Describe the ability to offer these fares. List all domestic and international air carriers accessible from the OBT.
- e) Does the OBT integrate with SAP Concur expense management tool?
- f) Does the proposed OBT allow for integration with International SOS Travel tracker?
- g) What is your level of adoption of New Distribution Capability (NDC) technology?
- h) Traveler profile: Describe how you will obtain and maintain traveler profile information.
- i) Policy Compliance: Describe your procedures to ensure traveler compliance with our travel policies for both offline and online bookings.
  - Indicate your ability to identify policy exceptions, such as travelers refusing low fares/economy travel in violation of policy or, travelers who are not booking preferred hotel or rental car suppliers. Describe your ability to identify the above exceptions on a pre-trip and post-trip basis.
- j) Describe your system to manage a client's unused tickets.
- k) Explain your process for voids and refunds. What is your processing turnaround time?
- l) Fares: Do you offer fare monitoring technology or processes? Describe.  
Do you have a low fare guarantee? Explain
- l) Quality Control: Describe what quality control processes happen at the time of reservation; between reservation and ticketing; between ticketing and departure; between departure and final return
- m) Mobile apps: Describe any means for utilizing apps for reservations, itineraries, travel alerts, etc.
- n) Visa: describe how these services are managed.

#### Discounts and Negotiation

Airline discount programs: Describe your existing airline contracts and discounts that will be available to CGIAR travelers

Hotel programs: Describe your existing hotel discount programs that will be available to CGIAR travelers

Ground transportation: Explain any relationships with ground transportation providers that may be beneficial to CGIAR

#### Account Management

- a) Proposed key staff: List the names, resumes, years of experience, and responsibilities of all individual(s) to be assigned to/responsible for managing this account.
- b) Regular Hours: The assigned agent(s) shall be available to during regular business hours of 9:00 AM to 6:00 PM (Paris time), Monday through Friday. Describe your plan for backup assistance, covering absences and assisting with unexpectedly high volume.
- c) After Hours: The travel agency must provide service 24/7/365. Describe how the travel agency's after-hours service program functions.

Request for Proposal Template (SO FN 01 PL 01 TL 02)

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- d) Billing: What forms of payment are accepted and preferred? Are you open to use credit cards Business Travel Accounts (BTA).
- e) Performance Monitoring/Customer Service: How do you measure your overall effectiveness in providing travel management services to your customers?
- f) Communication: The travel agency will be required to provide communication and educational assistance to travel bookers and travelers. Describe the communication plan the TMC would propose to create awareness of the agency as a single solution provider for CGIAR
- g) Duty of Care: In the event of a travel emergency, describe your ability to identify, locate and assist travelers. Explain the process to communicate with CGIAR and to assist 24x7 as needed.
- h) Industry updates: How will you keep CGIAR travelers abreast of important industry and market updates in a timely and effective manner?

#### Implementation

- a) Provide an implementation plan and schedule of events from estimated award date
- b) Training: Discuss what training will be provided by the bidder.

#### Reporting

- a) Describe your management reporting system. How is access to this system controlled?
- b) Provide samples of the types of reporting the Travel Agency has available - monthly and annual reports of transactions, including itinerary, tickets issued, refunds, unused tickets, and other travel information.

#### References

- a) Provide at least three references of client with contact details for which a similar set of services are currently being provided. References should include a company name, company contact, title, email address and phone number

#### **Financial Proposal**

Provide detailed pricing per transaction or other modality used by the TMC, including any additional or ancillary costs and why the proposed pricing model is best for the CGIAR System Organization.

- a) Financial Offer as per the below service structure
- b) Outline any other additional services and products that may have additional costs.
- c) Provide a sample report with any backup documentation that would normally accompany the invoice.
- d) Describe any value-add services or amenities that will be available to the CGIAR System Organization and related entities

#### **Service fee structure in USD (exclusive of VAT)**

SERVICE DESCRIPTION	OFFLINE <sup>1</sup>	ONLINE	REMARKS/CONDITIONS
<b>Booking:</b>			
Domestic airline ticket			
International airline ticket			
Group airline ticket - domestic			
Group airline ticket - international			
Rail			
Hotel			
Car rental			
Ancillary services (seat luggage meals etc)			
<b>Modification after ticketing:</b>			
Airline			
Rail			
Hotel			
Car rental			
Ancillary services			
<b>Refund</b>			
Airline			
Rail			
Hotel			
Car rental			
Ancillary services			
<b>Miscellaneous</b>			

**Alternate Pricing**

In addition to the above financial offer, the bidder may submit alternative financial proposals, however the information requested above must be supplied and will be used for proposal evaluation purposes.

End of document

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<sup>1</sup> a. Offline booking – Full service agent assist transactions