



# Request for Proposals (RfP) Travel Services for IUCN HQ

## IUCN Headquarters

RfP Reference: IUCN-22-07-Px-1

Welcome to this Procurement by IUCN. You are hereby invited to submit a Proposal. Please read the information and instructions carefully because non-compliance with the instructions may result in disqualification of your Proposal from this Procurement.

### 1. REQUIREMENTS

- 1.1. A detailed description of the services and/or goods to be provided can be found in Attachment 1.

### 2. CONTACT DETAILS

- 2.1. During the course of this procurement, i.e. from the publication of this RfP to the award of a contract, you may not discuss this procurement with any IUCN employee or representative other than the following contact. You must address all correspondence and questions to the contact, including your proposal.

IUCN Contact: Johary Rakotojohary, [johary.rakotojohary@iucn.org](mailto:johary.rakotojohary@iucn.org)

### 3. PROCUREMENT TIMETABLE

- 3.1. This timetable is indicative and may be changed by IUCN at any time. If IUCN decides that changes to any of the deadlines are necessary, we will publish this on our website and contact you directly if you have indicated your interest in this procurement (see Section 3.2).

DATE	ACTIVITY
22 August 2022	Publication of the Request for Proposals
29 August 2022	Deadline for expressions of interest
2 September 2022	Deadline for submission of questions
9 September 2022	Planned publication of responses to questions
23 September 2022 (23h00 CET)	Deadline for submission of proposals to IUCN (" <b>Submission Deadline</b> ")
7 October 2022	Clarification of proposals
21 October 2022	Shortlisted bidder presentations
November 2022	Planned date for contract award
1 January 2023	Expected contract start date

- 3.2. Please email the IUCN contact to express your interest in submitting a proposal by the deadline stated above. This will help IUCN to keep you updated regarding the procurement.

#### 4. COMPLETING AND SUBMITTING A PROPOSAL

4.1. Your Proposal must consist of the following four separate documents:

- Signed Declaration of Undertaking (see Attachment 2)
- Pre-Qualification Information (see Section 4.3 below)
- Technical Proposal (see Section 4.4 below)
- Financial Proposal (see Section 4.5 below)

Proposals must be prepared in English.

4.2. Your Proposal must be submitted by email to the IUCN Contact (see Section 2). The subject heading of the email shall be [RfP Reference – bidder name]. The bidder name is the name of the company/organisation on whose behalf you are submitting the proposal, or your own surname if you are bidding as a self-employed consultant. Your proposal must be submitted in PDF format. You may submit multiple emails suitably annotated, e.g. Email 1 of 3, if attached files are too large to suit a single email transmission. You may not submit your Proposal by uploading it to a file-sharing tool.

**IMPORTANT:** Submitted documents must be password-protected so that they cannot be opened and read before the submission deadline. Please use the same password for all submitted documents. After the deadline has passed and within 12 hours, please send the password to the IUCN Contact. This will ensure a secure bid submission and opening process. Please DO NOT email the password before the deadline for Proposal submission.

4.3. *Pre-Qualification Criteria*

IUCN will use the following Pre-Qualification Criteria to determine whether you have the capacity to provide the required goods and/or services to IUCN. Please provide the necessary information in a single, separate document.

<b>Pre-Qualification Criteria</b>	
<b>1</b>	3 relevant references of clients similar to IUCN / similar work
<b>2</b>	Confirm that you have all the necessary legal registrations to perform the work
<b>3</b>	State your annual turnover for each of the past 3 years
<b>4</b>	How many employees does your organisation have who are qualified and available for this work?
<b>5</b>	Confirm that your organisation has formal policies and/or procedures for the following: <ul style="list-style-type: none"> <li>• code of conduct and ethics</li> </ul>
<b>6</b>	Please confirm that you can meet IUCN's requirements for visa information, reporting, invoicing and payment, and data security as stated in Attachment 1.
<b>7</b>	Please indicate whether you receive commissions from airlines and other providers. If you do, please clarify how you ensure that this does not negatively impact IUCN's best interests.

4.4. *Technical Proposal*

The technical proposal must address each of the criteria stated below explicitly and separately, quoting the relevant criteria reference number (left-hand column).

Proposals in any other format will significantly increase the time it takes to evaluate, and such Proposals may therefore be rejected at IUCN's discretion.

Where CVs are requested, these must be of the individuals who will actually carry out the work specified. The individuals you put forward may only be substituted with IUCN's approval.

IUCN will evaluate technical proposals with regards to each of the following criteria and their relative importance:

	Description	Information to provide	Relative weight
1	Option Presentation	Please provide an example (e.g. screenshot) of how travel options are presented a) online and b) offline.	5%
2	OBT Searches	Please describe the process for doing several similar searches in your Online Booking Tool and explain how to avoid having to re-enter the relevant data. For example, from one origin to a series of destinations near each other, or for the same trip on consecutive dates.	3%
3	Offline Team	Please describe the team providing the offline service. Is the individual agent identifiable from the correspondence, e.g. the options provided?	5%
4	Service Levels	What are your times for a) responding to emails/phone calls; b) providing travel options; and c) issuing tickets after the traveller has chosen an option? Please share with IUCN your typical Service Level Agreement, including penalties.	5%
5	Last-minute Changes	Describe your processes for dealing with last-minute changes and cancellations, considering especially that the traveller may be stressed, unable to access the full range of online services and information, and in a different time zone.	10%
6	Quality Control	How do you ensure that the best options are identified? What quality control measures do you have in place?	15%
7	Quality Control	How do you deal with a situation where the traveller believes they have identified a better option elsewhere, and how do you ensure this does not happen?	5%
8	Complaints	What is your process for dealing with complaints? How do you track and report on complaints? How do you ensure involvement from IUCN management is minimised?	10%
9	Unusual and Remote Destinations	How do you book travel options that may not be on the Global Distribution System, e.g. local short-haul flights, trains, other means of transport, hotels, etc.?	3%
10	Traveller Profiles	Can the creation of traveller profiles for new staff, and the deletion of leavers, be linked to IUCN's Active Directory and thus automated? If not, what is the minimum information needed to create a new profile? Please provide screenshots of the profile creation process.	3%
11	Non-staff Bookings	For non-staff bookings, how do you ensure that a) no one can book who is not authorised; b) tickets are not lost due to delays in approval; c) admin effort is minimal; and d) only tickets that comply with the relevant policy are offered (the policy may be specific to a particular event)?	10%
12	Implementation	Please describe your approach to implementation and give a timetable from contract award to "go live".	1%

13	Events Services	Related to Events support: please provide a detailed description of your services related to Events organisation.	10%
14	Fares	To allow us to evaluate your ability to identify competitive fares and ticket flexibility conditions as well as the presentation of options and your ability to manage complex trips, we will issue you with details of five trips to book on 27 September 2022. Please send us time-stamped screenshots/emails from your live system as if you were offering real options by 28 September 2022 (24 hours after the details are shared).	15%
TOTAL			100%

#### 4.5. *Financial Proposal*

4.5.1. The financial proposal must be a schedule of unit costs for the provision of the goods/services stated in the RfP in their entirety. Please clearly state what the “unit” in question is for each price item, including whether this is a one-off cost or ongoing, recurring, or related to volume.

#### 4.5.2. *Prices include all costs*

Submitted rates and prices are deemed to include all costs, insurances, taxes (except VAT, see below), fees, expenses, liabilities, obligations, risk and other things necessary for the performance of the Terms of Reference or Specification of Requirements. IUCN will not accept charges beyond those clearly stated in the Financial Proposal. This includes applicable withholding taxes and similar. It is your responsibility to determine whether such taxes apply to your organisation and to include them in your financial offer.

#### 4.5.3. *Applicable Goods and Services Taxes*

Proposal rates and prices shall be exclusive of Value Added Tax.

#### 4.5.4. *Currency of proposed rates and prices*

All rates and prices submitted by Proposers shall be in CHF or EUR.

4.6. Additional information not requested by IUCN should not be included in your Proposal and will not be taken into account in the evaluation.

4.7. Your proposal must remain valid and capable of acceptance by IUCN for a period of 90 calendar days following the submission deadline.

#### 4.8. *Withdrawals and Changes*

You may freely withdraw or change your proposal at any time prior to the submission deadline by written notice to the IUCN Contact. However, in order to reduce the risk of fraud, no changes or withdrawals will be accepted after the submission deadline.

### 5. **EVALUATION OF PROPOSALS**

#### 5.1. *Completeness*

IUCN will first check your proposal for completeness. Incomplete proposals will not be considered further.

#### 5.2. *Pre-Qualification Criteria*

Only proposals that meet all of the pre-qualification criteria will be evaluated.

### 5.3. *Technical Evaluation*

#### 5.3.1. *Scoring Method*

Your proposal will be assigned a score from 0 to 10 for each of the technical evaluation criteria, such that '0' is low and '10' is high.

#### 5.3.2. *Minimum Quality Thresholds*

Proposals that receive a score of '0' for any of the criteria will not be considered further.

#### 5.3.3. *Technical Score*

Your score for each technical evaluation criterion will be multiplied with the respective relative weight (see Section 4.4) and these weighted scores added together to give your proposal's overall technical score.

### 5.4. *Financial Evaluation and Financial Scores*

The financial evaluation will be based upon an estimated total price calculated from the pricing schedule you submit, combined with IUCN's best estimate of future travel volumes. For the purposes of this evaluation only, IUCN will assume a volume of 1,500 tickets per year.

Your financial proposal will receive a score calculated by dividing the lowest financial proposal that has passed the minimum quality thresholds (see Section 5.3.2) by the total price of your financial proposal.

Thus, for example, if your financial proposal is for a total of CHF 100 and the lowest financial proposal is CHF 80, you will receive a financial score of  $80/100 = 80\%$

### 5.5. *Total Score*

Your proposal's total score will be calculated as the weighted sum of your technical score and your financial score.

The relative weights will be:

<b>Technical:</b>	<b>70%</b>
<b>Financial:</b>	<b>30%</b>

Thus, for example, if your technical score is 83% and your financial score is 77%, you will receive a total score of  $83 * 70\% + 77 * 30\% = 58.1\% + 23.1\% = 81.2\%$ .

Subject to the requirements in Sections 4 and 7, IUCN will invite the top two or three highest-scoring bidders to give a presentation. The date, time and content will be communicated as part of the invitation. A further score out of 20 will be awarded for the presentation and added to the technical score.

IUCN will award the contract to the bidder whose proposal achieves the highest total score after the presentations.

## 6. **EXPLANATION OF PROCUREMENT PROCEDURE**

6.1. IUCN is using the Open Procedure for this procurement. This means that the contracting opportunity is published on IUCN's website and open to all interested parties to take part, subject to the conditions in Section 7 below.

6.2. You are welcome to ask questions or seek clarification regarding this procurement. Please email the IUCN Contact (see Section 2), taking note of the deadline for submission of questions in Section 3.1.

6.3. All proposals must be received by the submission deadline in Section 3.2 above. Late proposals will not be considered. All proposals received by the submission deadline will be evaluated by a team of three or more evaluators in accordance with the evaluation criteria

stated in this RfP. No other criteria will be used to evaluate proposals. The contract will be awarded to the bidder whose proposal received the highest Total Score. IUCN does, however, reserve the right to cancel the procurement and not award a contract at all.

- 6.4. IUCN will contact the bidder with the highest-scoring proposal to finalise the contract. We will contact unsuccessful bidders after the contract has been awarded and provide feedback. The timetable in Section 3.1 gives an estimate of when we expect to have completed the contract award, but this date may change depending on how long the evaluation of proposals takes.

## **7. CONDITIONS FOR PARTICIPATION IN THIS PROCUREMENT**

- 7.1. To participate in this procurement, you are required to submit a proposal, which fully complies with the instructions in this RfP and the Attachments.

7.1.1. It is your responsibility to ensure that you have submitted a complete and fully compliant proposal.

7.1.2. Any incomplete or incorrectly completed proposal submission may be deemed non-compliant, and as a result you may be unable to proceed further in the procurement process.

7.1.3. IUCN will query any obvious clerical errors in your proposal and may, at IUCN's sole discretion, allow you to correct these, but only if doing so could not be perceived as giving you an unfair advantage.

- 7.2. In order to participate in this procurement, you must meet the following conditions:

- Free of conflicts of interest
- Registered on the relevant professional or trade register of the country in which you are established (or resident, if self-employed)
- In full compliance with your obligations relating to payment of social security contributions and of all applicable taxes
- Not been convicted of failing to comply with environmental regulatory requirements or other legal requirements relating to sustainability and environmental protection
- Not bankrupt or being wound up
- Never been guilty of an offence concerning your professional conduct
- Not involved in fraud, corruption, a criminal organisation, money laundering, terrorism, or any other illegal activity.

- 7.3. You must complete and sign the Declaration of Undertaking (see Attachment 2).

- 7.4. If you are participating in this procurement as a member of a joint venture, or are using sub-contractors, submit a separate Declaration of Undertaking for each member of the joint venture and sub-contractor, and be clear in your proposal which parts of the goods/services are provided by each partner or sub-contractor.

- 7.5. Each bidder shall submit only one proposal, either individually or as a partner in a joint venture. In case of joint venture, one company shall not be allowed to participate in two different joint ventures in the same procurement nor shall a company be allowed to submit a proposal both on its behalf and as part of a joint venture for the same procurement. A bidder who submits or participates in more than one proposal (other than as a subcontractor or in cases of alternatives that have been permitted or requested) shall cause all the proposals with the bidder's participation to be disqualified.

- 7.6. By taking part in this procurement, you accept the conditions set out in this RfP, including the following:

- It is unacceptable to give or offer any gift or consideration to an employee or other representative of IUCN as a reward or inducement in relation to the awarding of a contract. Such action will give IUCN the right to exclude you from this and any future procurements, and to terminate any contract that may have been signed with you.

- Any attempt to obtain information from an employee or other representative of IUCN concerning another bidder will result in disqualification.
- Any price fixing or collusion with other bidders in relation to this procurement shall give IUCN the right to exclude you and any other involved bidder(s) from this and any future procurements and may constitute a criminal offence.

## **8. CONFIDENTIALITY AND DATA PROTECTION**

- 8.1. IUCN follows the European Union's General Data Protection Regulation (GDPR). The information you submit to IUCN as part of this procurement will be treated as confidential and shared only as required to evaluate your proposal in line with the procedure explained in this RfP, and for the maintenance of a clear audit trail. For audit purposes, IUCN is required to retain your proposal in its entirety for 10 years and make this available to internal and external auditors and donors as and when requested.
- 8.2. In the Declaration of Undertaking (Attachment 2) you need to give IUCN express permission to use the information you submit in this way, including personal data that forms part of your proposal. Where you include personal data of your employees (e.g. CVs) in your proposal, you need to have written permission from those individuals to share this information with IUCN, and for IUCN to use this information as indicated in 8.1. Without these permissions, IUCN will not be able to consider your proposal.

## **9. COMPLAINTS PROCEDURE**

If you have a complaint or concern regarding the propriety of how a competitive process is or has been executed, then please contact [procurement@iucn.org](mailto:procurement@iucn.org). Such complaints or concerns will be treated as confidential and are not considered in breach of the above restrictions on communication (Section 2.1).

## **10. CONTRACT**

The contract will be based on IUCN's template in Attachment 3, the terms of which are not negotiable. They may, however, be amended by IUCN to reflect particular requirements.

## **11. ABOUT IUCN**

IUCN is a membership Union uniquely composed of both government and civil society organisations. It provides public, private and non-governmental organisations with the knowledge and tools that enable human progress, economic development and nature conservation to take place together.

Headquartered in Switzerland, IUCN Secretariat comprises around 1,000 staff with offices in more than 50 countries.

Created in 1948, IUCN is now the world's largest and most diverse environmental network, harnessing the knowledge, resources and reach of more than 1,300 Member organisations and some 10,000 experts. It is a leading provider of conservation data, assessments and analysis. Its broad membership enables IUCN to fill the role of incubator and trusted repository of best practices, tools and international standards.

IUCN provides a neutral space in which diverse stakeholders including governments, NGOs, scientists, businesses, local communities, indigenous peoples organisations and others can work together to forge and implement solutions to environmental challenges and achieve sustainable development.

Working with many partners and supporters, IUCN implements a large and diverse portfolio of conservation projects worldwide. Combining the latest science with the traditional knowledge of local communities, these projects work to reverse habitat loss, restore ecosystems and improve people's well-being.

[www.iucn.org](http://www.iucn.org)

<https://twitter.com/IUCN/>

## **12. ATTACHMENTS**

Attachment 1 *Specification of Requirements / Terms of Reference*

Attachment 2 *Declaration of Undertaking (select 2a for companies or 2b for self-employed as applicable to you)*

Attachment 3 *Contract Template*

Attachment 4 *IUCN Travel Policy for Staff*

Attachment 5 *IUCN Travel Policy for non-Staff*



## ATTACHMENT 1: STATEMENT OF REQUIREMENTS

### 1. Background data

IUCN HQ's travel pattern varies significantly year-on-year. Our staff travel to and from a large variety of locations, and there are few destinations to which we travel very frequently.

Like many other organisations, our air travel nearly ceased completely during 2020-21 but is now picking up again. We expect travel volumes to return to pre-2020 levels during 2022.

	2017	2018	2019	2020	2021
Travel spend	805,696	1,338,522	970,334	130,164	78,235
Transactions	1,750	1,669	1,292	322	133
Top-10 destinations	146,860 (18%)	256,378 (19%)	196,959 (20%)	47,022 (36%)	*
Online adoption	42%	12%**	13%**	21%**	*
Long haul	648,643 (81%)	1,197,785 (89%)	851,489 (88%)	110,272 (85%)	*
Business class	104,898 (13%)	223,276 (17%)	119,785 (12%)	23,475 (18%)	*

\* Data not available

\*\* From January 2018 to mid-2020, IUCN HQ had an in-house travel agent ("implant"), which resulted in a significant drop in online bookings. Even without COVID, this option of having an implant has proven not to be economically viable for IUCN, however.

You can find IUCN's travel policies for staff and non-staff in Attachments 4 and 5 of the Request for Proposals.

### 2. Flight/train/hotel/car bookings for individual travellers

IUCN HQ is looking for a travel services provider to facilitate the booking of flights, primarily, but also trains, hotels and hire cars.

- a. The provider must offer an online booking tool for simple, point-to-point journeys.
- b. The provider must offer an offline service. The offline team dedicated to IUCN should be reasonably small such that each service operative is fully familiar with IUCN and its travellers. Bookings and queries relating to a traveller should normally be handled by the same service operative from end to end.
- c. Requests to the offline service will be made by email, with support provided by email or over the phone if the traveller so desires.
- d. Options will be presented, both online and offline, in a standard format that is easy to read and understand, with conditions – especially regarding changes, cancellations, luggage allowance – clearly indicated.
- e. At least three logical options will be offered, where available.
- f. The traveller will be alerted regarding visa requirements based on their profile.
- g. The provider's system and processes should allow bookings with all available service providers (airlines, rail operators, hotels, etc), except those that are black-listed.
- h. Booking confirmations and tickets will be delivered electronically.
- i. The provider will commit to stringent Service Levels regarding system availability, response times and customer satisfaction.
- j. The provider must offer the services for IUCN staff as well as non-IUCN-staff whose travel is being paid by IUCN. There must be a simple but effective approval process for non-staff.
- k. IUCN prefers a provider who offers significant benefits through fares that they have negotiated directly with carriers and hotels.

### 3. Last minute changes and cancellations

IUCN's traveller's plans frequently change at the last minute. The provider must offer dedicated support for this, bearing in mind that at the moment when changes are required, travellers may be in a different time zone and without easy access to the full range of means of communication.

#### 4. Traveller profiles

The provider must provide a system for easy recording and maintenance of traveller profiles, such that relevant information for the provision of travel options and bookings does not need to be repeatedly submitted by the traveller. This must include, at a minimum, the traveller's full name, contact details, date of birth, nationality, passport number (several passports must be supported), frequent flyer card numbers, seating and meal preferences.

Traveller profiles must be easy and quick to set up and update.

The system must facilitate the creation of profiles for new starters and deletion of those of leavers.

Traveller profiles must clearly indicate whether the traveller is an IUCN staff member or not.

#### 5. Visa information

Travel options must include information on visa requirements based on the traveller's passport, including for transfers and stopovers.

#### 6. Events

The provider must offer the full range of meetings and events services, including flight/train bookings, airport transport, accommodation, transport to and from the venue, and registration, approvals and tracking.

IUCN seeks a provider who can manage meetings and events pro-actively, taking the majority of work related to travel arrangements off IUCN's hands. This includes, in particular, liaising with the individual travellers, tracking and following up on outstanding bookings, dealing with questions and ensuring customer satisfaction.

In most cases, the management of the events themselves, including selection of the venue and related services, will be done separately and often by IUCN's members or partners.

IUCN's requirements for travel services related to events are often very specific and may differ significantly from those detailed here. For any particular major event, IUCN reserves the right to select a dedicated agency through a separate selection process.

#### 7. Support, Complaints

The provider must offer clear procedures and resources for dealing with queries, support and complaints for both offline and online bookings. IUCN HQ does not have a dedicated travel management team. Any issues that travellers or bookers may experience need to be dealt with by the travel services provider without involvement from IUCN management in the first instance.

This includes, specifically, providing contact details for someone who will address complaints in a timely fashion, and a clear escalation procedure.

In the past, most complaints have been about a) response times, b) non-availability of travel options that the traveller has found elsewhere, c) human error on the part of the travel service operative.

## 8. Reporting

IUCN requires monthly reports in MS Excel format on all bookings made, as well as annual reports on top destinations, top airlines, ticket class, top travellers, online vs offline bookings, long vs short haul, average ticket price, carbon emissions etc.

IUCN's donors and auditors may sometimes request specific information, and the provider must therefore be able to provide ad hoc reports/data.

## 9. Invoicing and payment

Payments shall be made through a lodge card or similar. IUCN requires a monthly consolidated statement that includes mandatory and non-mandatory fixed data specified by IUCN (e.g. Travel Authorisation number), where "mandatory" means that the booking cannot be made without this information.

The statement must facilitate IUCN's internal allocation of travel costs to the relevant cost centres and projects.

Ideally, the provider will be able to invoice personal upgrades or stop-overs paid by the traveller directly to that traveller.

## 10. Carbon offsetting (optional)

IUCN will consider carbon offsetting schemes offered by the provider.

## 11. Duty of Care and emergency responses

IUCN has a third-party provider specifically for monitoring travel security.

## 12. Data security, emergency planning, continuity of service, disaster recovery

The provider must keep IUCN's data, particularly personal data, secure and in strictest confidence and ensure compliance with GDPR.

There must be effective measures in place to guarantee continuity of service and disaster recovery.

## 13. Implementation

The provider will be responsible for implementing the service and related systems in a timely, efficient and effective fashion, including configuration and testing of relevant systems (online booking tool, traveller profiles, approval process, etc) and communication/training for IUCN staff. The service needs to be in place and fully functional by January 1<sup>st</sup> 2023.