



INVITATION TO TENDER

THE COUNCIL FOR SCIENTIFIC AND INDUSTRIAL RESEARCH (CSIR) IN SOUTH AFRICA INVITES EXPERIENCED SERVICE PROVIDERS TO BID FOR THE FOLLOWING SERVICE:

Bid Description	The provision of fleet management services to the CSIR on an as and when required basis for a period of five (5) years	
Bid Number:	RFP No. 3454/28/05/2021	
Date of Issue	Friday, 07 May 2021	
Virtual Briefing Session	Date	Friday, 14 May 2021
	Time	11:00am
	MS Teams Link	https://teams.microsoft.com/l/meetup-join/19%3ameeting_YTkYn2MyZDMtZjQ4Ny00MTUzLTliMTYtODk2OTg2YmQ2NGVl%40thread.v2/0?context=%7b%22Tid%22%3a%22fd3c5d5-ddb2-4ed3-9803-f89675928df4%22%2c%22Oid%22%3a%22f18e6ffd-88a6-4cc3-94d4-53009099a8c7%22%7d
Last date for submission queries	Friday, 21 May 2021	
Closing Date and Time	Friday, 28 May 2021 at 23:59	

Please refer to Annexure A and B of this Invitation to Bid for detailed specification and bid requirements

Tender documents can be purchased at a non-refundable fee of R1150.00 (VAT included) on the PURCO SA website. Visit www.purcosa.co.za.

Any queries must be in writing to Mr Tshepo Mampuru at tshepo.mampuru@purcosa.co.za.

All tender document availability and tender submission related queries must be sent to molemoshi.ramokolo@purcosa.co.za, contact number 011 545 0940.

Submission for the tender is online via the PURCO SA website (link for submission is in the tender document).

Annexure A

Detailed Specification and Requirements

Technical Specification

1. INVITATION FOR PROPOSAL

The CSIR, in collaboration with the Purchasing Consortium Southern Africa (PURCO SA), hereby invites proposal for the provision of fleet management services the CSIR on an as and when required basis for a period of five (5) years.

1.1. Fleet Management Services refers to integrated fleet management services, which includes:

- a. New Vehicle leasing;
- b. Full maintenance services of new leased vehicles;
- c. Fleet vehicle management;
- d. Fuel, credit card and telematics management.

1.2. Additional Adhoc-Services includes:

Maintenance service of CSIR owned fleet. This must be quoted together with integrated fleet management services. The CSIR reserve the right to award this with the whole bid or source the service through a separate tender process. Bidder must meet the requirement of "New Leased Vehicle" to be assessed on "Maintenance service of CSIR owned fleet".

2. PROPOSAL REQUIREMENTS

All proposals, including the pricing schedule, are to be submitted in a format specified in this RFP (see paragraph 3 of main RFP document: Submission of Proposals). Failure to adhere to this may result in disqualification as the tender may be deemed as non-responsive.

In view of the different business needs and diversity thereof, quotations will be required for each and every new transaction. The contract period of this service is 60 months.

2.1. Technical Proposal

The following must be submitted as part of the technical proposal:

- a. Bidder must submit a company profile indicating the core activities and number of years the bidder has been providing fleet management services;
- b. Bidder must submit a methodology and approach for the proposed required solution. This must include the actual process on how the fleet management service would be provided, a provisional project plan with timelines. (i.e. delivery/collection points, frequency, turnaround time, etc.);
- c. Bidder must submit a fleet contingency plan during urgent and emergency cases addressing how the bidder would response in case of major accident;
- d. Bidder must provide a value proposition to the CSIR (E.g. flexibility);
- e. Bidder must submit a minimum of five (5) written contactable reference letters of recent and current projects;
- f. Bidder must submit a valid letter of good standing from its banker's;
- g. Bidder must submit a valid letter of good standing for Compensation for Occupational Injuries and Diseases Act (COIDA) relevant to the scope of work (Should this be not relevant to the scope of work, the recommended bidder would be required make the inclusion of nature of business with Department of Labour or Private Assurer before conclusion of the contract);
- h. Bidder must submit a completed and signed SBD Form 1;
- i. Bidder must submit the completed and signed "Declaration by Bidders".

2.2. Financial Proposal:

The following must be submitted as part of the financial proposal:

- a. Proposed cost / commercial offer on the integrated fleet management services, and Additional Adhoc Services on official company letterhead as per Pricing Schedule (**Annexure C**);
- b. Certified copy of B-BBEE certificate or sworn affidavit. **B-BBEE certificate must be issued by SANAS accredited agency or a valid sworn affidavit in line with DTI regulations.** (RSA suppliers only); and
- c. CSD registration report (RSA suppliers only).

3. PROPOSAL SPECIFICATION

This specification is subject to all conditions and requirements as stated in this section of this document as well as any other accompanying documents in this RFP and shall be undertaken in the manner stated herein as well as the Service Level Agreement.

3.1. The fleet management services required are the following:

3.1.1. Vehicle leasing requirements (sale and lease back not an option):

- 3.1.1.1. Full maintenance lease services for the CSIR's long-term fleet requirements (max 5 years);
- 3.1.1.2. Full maintenance lease services includes registration costs and road-side assistance;
- 3.1.1.3. The delivery period for new and replacement vehicles may not exceed 30 days from the date ordered;
- 3.1.1.4. Quotations for new and replacement vehicles shall be valid for a minimum period of 30 days;
- 3.1.1.5. Quotations to be inclusive and quoted in two method i.e. variable and fixed for the duration of lease period.
- 3.1.1.6. Contract period and kilometres must be flexible suiting the CSIR business need. This must however, be reviewed regularly.

- 3.1.1.7. All initial quotations provided to the CSIR shall include normal wear and tear and the CSIR shall not be responsible for reconditioning costs associated with normal wear and tear.
- 3.1.1.8. The successful bidder must be able deliver required vehicle to the specified site CSIR premises across the country.
- 3.1.1.9. Vehicles of which the contract period has expired, must be collected by the successful bidder from specified site CSIR premises across the country.
- 3.1.1.10. All vehicles will be on individual contracts operating within specific business Divisions, Clusters, Centres and Portfolios. The management of these vehicles via a central oversight reporting framework is required.
- 3.1.1.11. All lease services to include monthly payments, based on agreed period of usage and kilometres, and which must allow for the re-structuring of individual vehicle schedules.
- 3.1.1.12. In view of the different business needs and diversity thereof, quotations will be required for each and every new transaction.
- 3.1.1.13. Leased vehicles shall be those of the current model year as determined by the date on which the vehicles are formally requested.
- 3.1.1.14. The successful bidder shall be expected to:
 - a. Undertake to leverage purchasing power to pass on fleet discounts to the CSIR;
 - b. Two monthly invoices per vehicle; one for vehicle rental and one for vehicle usage, and statement must submitted at the end of each month;
 - c. Provide fleet management support and recommendations in the event that a vehicle requires repair services but is under a manufacturer warranty.
 - d. Resolve any recurring technical and service problems on leased vehicles that may arise.

3.1.2. Managed maintenance services requirements for current CSIR owned fleet and existing contracts:

- 3.1.2.1. Managed maintenance for the CSIR's owned fleet of vehicles as outlined in **Annexure C1** (Part B).
- 3.1.2.2. Propose a solution with regard to the managed maintenance services for CSIR owned vehicles to include:

- 3.1.2.2.1. All managed maintenance to be done by the successful bidder including in a planned services, plus all wear-and- tear components such as wiper blades, brake pads, tyres, alternator, etc. (explain how wear and tear items are incorporated into maintenance programmes and what are the bidder's standard rules in respect of wear and tear items).

3.1.3. Fuel management

The successful bidder shall:

- 3.1.3.1. Provide fuel cards for all leased vehicles, except where otherwise stated or agreed upon.
- 3.1.3.2. The fuel cards provided must be vehicle specific with the vehicle registration number appearing on the card and must be accepted at multiple entities throughout the country but limited to fuel stations (for fuel and oil purchases only), parking services, toll gates, car washing and valet services.
- 3.1.3.3. Be expected to provide additional fuel cards for CSIR-owned and existing lease agreements on request, but that will also adhere to the usage requirements as specified in 3.1.3.2.
- 3.1.3.4. Propose an intelligent fuel management system that monitors fuel consumption and provides data and trend analysis to indicate and lower the risk of fuel abuse, theft and fraud. The system must be able to send immediate notifications to the CSIR Proxy
- 3.1.3.5. Provide monthly fuel card usage reports to the CSIR Proxy.
- 3.1.3.6. Provide clear procedures how to prevent abuse/misuse of fuel cards and recommends controls to detect abuse/misuse of fuel cards.
- 3.1.3.7. Provide a process flow for fuel card cancellation, should the need arise, This should include explicit agreements for determining when the liability for fuel card charges ends.
- 3.1.3.8. Assist drivers that may experience problems with the card through a 24/7 customer service facility.

3.1.4. Telematics

The winning bidder shall:

- 3.1.4.1. Specify proposed hardware & software to collect vehicle telematics data and provide user details on how the hardware works.
- 3.1.4.2. Ensure that the minimum data collected from the software includes vehicle tracking (real-time position), mileage, speed, acceleration, RPM information directly from the vehicle (as far as possible), vehicle utilisation, highlight of speeding exceptions and vehicle abuse, as well as accident reconstruction capabilities. The bidders are welcome to propose additional features as part of value proposition that will be of value-add to the CSIR over and above the stated minimum requirements.
- 3.1.4.3. Provide a clear indication of how the data will be presented to the CSIR and how the information can be used to manage CSIR fleet efficiently.
- 3.1.4.4. Specify suitable system integration requirements to ensure seamless integration to existing CSIR systems and hardware (System specification would be shared with successful bidder).
- 3.1.4.5. Specify any network or hardware requirements with secure access, including system administration capabilities (user creation, user roles and responsibilities, technical support, creating of geo-fences, etc.).

3.1.5. Security and Insurance of Assets

The successful bidder is responsible for:

- 3.1.5.1. Ensuring that vehicles are fitted with standard agreed electronic mechanisms (Specified by the CSIR), such as the following, to prevent and/or deter theft:
 - a. Alarms (level 4 or above).
 - b. Immobilizers.
 - c. Tracking Units.
- 3.1.5.2. CSIR is responsible for providing comprehensive vehicle insurance for all vehicles.

3.1.6. Fleet management system and reporting capabilities

- a. Must be able to be integrated/ interfaced with CSIR specific systems;
- b. Must have proxy management capability;
- c. Must be able to provide comprehensive and consolidated fleet operating costs;

- d. Must be Online Web-based system with multiple parameter reports and executive reports;
- e. Must be able to provide variance reports on all fleet management cost and activities;
- f. Must be able to reports on fuel consumption, and draw consumption exception reports.
- g. Must be able provide monthly variable billing and multiple billing.
- h. Must be able provide online quotation; and
- i. Must be efficiency, effective and reliable

3.1.7. Specific terms and conditions on full maintenance lease vehicles (New Leases)

3.1.7.1. Vehicle selection on full maintenance lease vehicles

Vehicle selection shall remain the responsibility of the CSIR, however the successful bidder must:

- 3.1.7.1.1. Assist the CSIR in the selection of vehicles by providing advice on market trends, resale values and vehicle's capability in terms of engine capacity and utility as required.
- 3.1.7.1.2. Leverage buying power to realise savings to the CSIR, thereby reducing the total cost of the lease per month.
- 3.1.7.1.3. Advise on total life time operating costs of vehicles.
- 3.1.7.1.4. Compare vehicles in particular categories.
- 3.1.7.1.5. Deliver the vehicles to the CSIR, nationwide.

3.1.8. Utilisation Management

The successful bidder will be required to use utilisation indicator reports, such as fuel to establish odometer readings on a quarterly basis to match vehicle utilisation and cost, and make recommendations for restructuring.

3.1.9. Relief/ Ad-hoc vehicles

- 3.1.9.1. Relief/ ad-hoc vehicles must be available on request, with a notice period of minimum 48 hours given to the successful bidder. Relief/ ad-hoc may be required in the event that a vehicle has broken down/ taken for repairs/ or being serviced or involved in accident.

- 3.1.9.2. CSIR's Fleet Management Office shall be responsible for requesting ad-hoc/ relief vehicles on behalf of the clusters/ portfolios. However, the relevant business division/ cluster/ portfolio shall be billed for the costs.

3.1.10. CSIR owned vehicle inspection

- 3.1.10.1. The successful bidder shall develop an inspection schedule and inspect all vehicles at least bi-annually, to ensure that the vehicles are well maintained.
- 3.1.10.2. The CSIR shall inspect the vehicles, as it deems necessary from time to time to ensure the vehicles are well maintained.

NB: The CSIR reserves the right to not award 1.2 and 3.1.10 with the whole tender and source the service through a separate tender. Bidder must meet the requirement of "New Leased Vehicle" to be assessed on "Maintenance service of CSIR owned fleet".

3.1.11. Accident Management

- 3.1.11.1. The CSIR shall ensure that all accidents are reported to the successful bidder within 24 hours of occurrence, and also keep record of accidents thereof.
- 3.1.11.2. The successful bidder shall:
- a. Maintain record of accidents;
 - b. Establish accident trends; and
 - c. Arrange vehicle replacement/ temporary vehicle to ensure minimal service disruptions.

3.1.12. Maintenance Management

- 3.1.12.1. The CSIR shall abide by the service intervals for all vehicles as per contract, and therefor a clear schedule must be provided with each vehicle.
- 3.1.12.2. The successful bidder shall:
- a. Ensure the correctness of all maintenance invoices as the CSIR shall not be responsible for any incorrect billing;
 - b. Provide the CSIR with a clear procedure on service bookings and approved service centres;
 - c. Have a nationwide network of franchised dealers for the servicing of vehicles;

- d. Include and provide a breakdown and emergency service, as and when required; and
- e. Stipulate procedures for emergency repairs and servicing.

3.1.13. Licence Renewals

The successful bidder shall facilitate license renewals and ensure delivery of new license discs to the stipulated vehicle custodians at CSIR sites.

3.1.14. Contract Management

The successful bidder is required to:

- 3.1.14.1. Appoint a key person who will be responsible for the implementation, management and coordination of the agreement between the CSIR and the successful bidder. The key person will be expected to attend meetings with the CSIR on a monthly basis or as required.
- 3.1.14.2. Enter into a Service Level Agreements (SLA) with the CSIR for performance monitoring and management.
- 3.1.14.3. Assist the CSIR with road shows related to fleet management as and when required.
- 3.1.14.4. Provide advice on fleet management when it required.
- 3.1.14.5. Differentiate between the finance portion and maintenance costs on each contract.
- 3.1.14.6. Resolve recurring technical and service problems on vehicles.
- 3.1.14.7. Build in a market-related Rateable Value in both leased and owned vehicle.
- 3.1.14.8. Undertake to pass on fleet discounts to the CSIR by using purchasing power.
- 3.1.14.9. Conduct benchmarking of vehicles – comparison of one vehicle against another in order to measure operating efficiency.

3.1.15. Value Added Services

The following value added services will be required from the successful bidder:

- 3.1.15.1. Facilitation of advanced driving courses, as and when required by the CSIR.
- 3.1.15.2. Provide relevant system training to CSIR fleet management team and users, as and when required.
- 3.1.15.3. Conduct a needs analysis within the first three months of contract implementation
- 3.1.15.4. Conduct user satisfaction surveys after one year of each contract, then every 18 months thereafter for the duration of the contract, with the intent to assess actual

service delivery against the SLA requirements. The findings of which are to be considered and, if agreed with vehicle custodians, to be implemented within 30 days from date of agreement of the finding.

- 3.1.15.5. The CSIR may require a 24-hour roadside assistance, emergency response and breakdown service, to be incorporated with the vehicle tracking and monitoring system or as a separate service and this requirement will not be mandatory for all CSIR vehicles. The vehicles identified for this service will be communicated to the service provider (s) upon appointment. The roadside assistance, emergency response and breakdown services should be provided as value added services to the CSIR.

3.1.16. CSIR Branding on vehicles

The CSIR reserves the right to make use of decals for the branding of vehicles. The decals used shall be either magnetic or easily removable with minimum damage to the vehicle.

Evaluation Methodology

4. EVALUATION CRITERIA

The CSIR has set minimum standards that a bidder needs to meet in order to be evaluated and selected as a successful bidder. The minimum standards consist of the following:

Pre-Qualification and Elimination Criteria (Phase 1)	Technical Evaluation Criteria (Phase 2)	Price and B-BBEE Evaluation (Phase 3)
Only bidders that comply with ALL the criteria set on paragraph 4.1 on Phase 1 below will proceed to technical/functional evaluation (Phase 2).	Bidder(s) are required to achieve a minimum threshold of 60 points on each of the individual criteria, and minimum threshold of 70 points out of 100 points overall. Only bidder (s) who met and/or exceeded the minimum threshold points on Phase 2 below will proceed to Price and B-BBEE Evaluation (Phase 3)	Bidder(s) will be evaluated out of 100 points i.e. 80 points for price and 20 points for B-BBEE.

4.1. Pre-Qualification and Elimination Criteria (Phase 1)

(a) Pre-Qualification Criteria

Only the following bidders will be considered for this tender:

1. B-BBEE status of level 1 to 4;

NB: A valid certified copy of a B-BBEE Certificate or valid sworn affidavit must be submitted to be considered for this tender. **B-BBEE certificate must be issued by SANAS accredited agency or a valid sworn affidavit in line with DTI regulations. (RSA suppliers only).**

(b) Elimination Criteria

Proposals will be eliminated under the following conditions:

1. Submission after the deadline (closing date and time);
2. Proposals submitted to incorrect location;
3. Suppliers that are listed on the National Treasury Database of restricted suppliers;
4. No submission of a valid license as an authorised financial service provider;
5. Non-submission of a valid letter of Good Standing from its banker/s;

4.2. Technical Evaluation Criteria (Phase 2)

Only proposals that have met the Pre-Qualification Criteria will be evaluated for technical/functionality. Technical/functionality will be evaluated as follows:

- a. Functional Evaluation – Proposals will be evaluated out of **100 points** and are required to achieve a minimum threshold of **60 points** on each of the individual criteria, and a minimum threshold of **70 points** out of 100 points overall.

The evaluation of the technical/functionality detail of the proposal will be based on the following criteria:

Phase 2: The second phase includes functionality using the following criteria:

No	ELEMENT	WEIGHT
1	Company Profile Number of years the company has been providing fleet management services should not be less than 10 years.	20
2	Audited Annual Financial Statement Audited past three (3) years annual financial statements; with signed audit report in case of a company.	20
3	Company Experience: Reference Letters The bidder must provide evidence that they have previously successfully and rendered a similar fleet management service. The bidder must provide not less than five (5) contactable	25

	references where similar fleet management service was successfully rendered. Reference letters must be provided to substantiate such claims.	
4	Fleet Management Plan: Methodology and Approach The bidder must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. A detailed fleet management plan design, approach, methodology and support mechanisms on how they will assist CSIR in providing fleet management service that is that is specific to CSIR nature of business, reliable, efficient, accountable, and cost effective.	35
TOTAL		100

Proposals with technical/functionality points of less than the pre-determined minimum overall percentage of **70 points** and less than **60 points** on each of the individual criteria will be eliminated from further evaluation.

Refer to “Technical Evaluation Matrix” below for the scoring ranges that will be used to evaluate functionality.

Technical Evaluation Matrix

Scoring sheet to be used to evaluate functionality

Criteria	Score description	Weighting
Company Profile Number of years the company has been providing fleet management solutions should not be less than five (5) years. Company Profile explicitly indicating the number of years the company has been offering and implementing fleet management strategy or solutions.	Company Profile	20
	0 = Company experience below five(5) years	
	6 = Company experience with five (5) to six (6) years	
	7 = Company experience with seven (7) to eight (8) years	
	10 = Company experience with nine (9) years and above	
Company Experience : References The bidder must provide evidence that they have successfully tailor-made and rendered a similar fleet management service. A minimum of three (3) contactable references letters, reflecting the required scope of works NB; The reference must show the work where the combination of some or all the aspects of the scope of work were done The references letters must have the following details: <ul style="list-style-type: none"> • The reference letter must be in official company letterhead; • One reference letter per entity; • The Reference letter must indicate the description of the services and date of the service provided, and value of the transaction or contract. • The reference letter must have email address and telephone number. • The Reference must be dated and signed. 	Company Experience : References	25
	0 = Less than five (5) written contactable reference letter or non-contactable reference letters provided	
	6 = Five (5) written contactable reference letter	
	7 = Six (6) written contactable reference letter	
	10 = More than seven (7) written contactable reference letter	

Audited Annual Financial Statement (AFS)	Audited Financial Statement	
<p>The latest three (3) years Annual financial statements with signed audit report must include at least the following:</p> <p>Statement of Profit and Loss & Other Comprehensive income Statement of Financial Position Statement of Cash Flow Notes, comprising a summary of significant accounting policies and other explanatory information</p> <p>Credit Check will be performed over in addition to the above.</p>	<p>0 = AFS not submitted or are incomplete' 0 = Signed audit report not submitted 0 = adverse audit findings</p>	20
	<p>6 = Complete Annual AFS provided with signed audit report and no adverse audit findings & acid test ratio ranging from 1 to 1.4</p>	
	<p>7 = Complete Annual AFS provided with signed audit report and no adverse audit findings & acid test ratio ranging from 1.5 to 2</p>	
	<p>10 = Complete Annual AFS provided with signed audit report and no adverse audit findings & acid test ratio greater than 2</p>	
Fleet Management Plan Design and Methodology	Fleet Management Plan Design and Methodology	
<p>The bidder must demonstrate their understanding of the key requirements and expectations of CSIR as outlined in this document. A detailed plan design, approach, methodology and support mechanisms on how they will assist CSIR in providing fleet management service that is reliable, efficient, accountable, and cost effective.</p> <p>Detailed Fleet Management Plan: Design and Approach. Demonstrate how they going to manage the fleet</p>	<p>0 = No Implementation Plan / Methodology and Approach submitted</p>	35
	<p>6 = Methodology and approach is specifically tailored to suit the requirements and will meet the needs. The plan is specifically tailored to meet CSIR requirements</p>	
	<p>7 = Methodology and approach is sufficient and acceptable, the asset life cycle and plan are suited to the CSIR needs. The plan is in sync with the scope of work and deliverables</p>	
	<p>10 = Methodology and approach is innovative and well articulated, the asset life cycle and plan are suited to the CSIR needs. The Plan is in sync with the scope of work and deliverables</p>	
TOTAL		100