

## Request for Proposals (RFP)

**The provision or supply of transport and or other social survey services for all Household enumeration in the City of Johannesburg**

**RFP No. 3254/20/12/2018**

Date of Issue	Friday, 30 November 2018	
Compulsory briefing session	Friday, 07 December 2018 Place: CSIR, Pretoria Time: 11:00 -12:00 Building: 02 Venue: BE-R-2-A103 Executive Boardroom	
Closing Date	Thursday, 20 December 2018 at 16:30	
Place	Tender box, CSIR Main Reception, Gate 3 ( North Gate)	
Enquiries	Strategic Procurement Unit	E-mail: <a href="mailto:tender@csir.co.za">tender@csir.co.za</a>
CSIR business hours	08h00 – 16h30	
Category	Professional Services	

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## SECTION A – TECHNICAL INFORMATION

### 1 INTRODUCTION

The Council for Scientific and Industrial Research (CSIR) is one of the leading scientific research and technology development organisations in Africa. In partnership with national and international research and technology institutions, CSIR undertakes directed and multidisciplinary research and technology innovation that contributes to the improvement of the quality of life of South Africans. The CSIR's main site is in Pretoria while it is represented in other provinces of South Africa through regional offices.

### 2 BACKGROUND

The CSIR's services have been commissioned by Gauteng Department of Roads and Transport (GDRT) to undertake primary data collection as it relates to household travel patterns. The understanding is that the province has to date carried out two large-scale household travel surveys, one in 2002 and the other in 2014. While the 2002 survey was fully carried out by province, the 2014 survey entailed a consolidation of individual survey datasets from metropolitan and district municipalities in the province. However, subsequent use of the 2014 survey data presented a number of challenges that impede on Integrated Transport Planning practices. E.g., it was not possible from the 2014 datasets to map inter-municipal trip destinations at a transport zone level,

The objective of the General Household Travel Survey (GHTS) of 2018/19 is to investigate demand and supply of land transportation from the perspective of randomized households across **Gauteng Province** through household level surveys.

The CSIR requests assistance with the primary data collection of households' responses. Submissions from one or more suitable service providers in order to expedite the process of on-board minibus taxi surveys are required. The service provider/s will be required to capture the data that is collected in a prescribed format.

### 3 INVITATION FOR PROPOSAL

Proposals are hereby invited for the provision of professional services to undertake primary data collection and data capturing for an identified number of households in the City of

Johannesburg. The project is planned to commence in **January 2019** and to be concluded by the 31<sup>st</sup> of **March 2019**.

*Table 1: The number of sample households in the City of Johannesburg*

<b>Region</b>	<b>Estimated No</b>
<b>Johannesburg</b>	<b>9000</b>

It is on the basis of the above mentioned sample size that the prospective service providers are supplied with the General Household Travel Survey (GHTS) and data capturing costing template in **Annexure “B”**. The prospective bidders are expected to use the sampled number of households per municipality and timeframes provided, to calculate the rates to survey a single household. Inputs required in the costing template are highlighted in yellow, e.g. daily rates for mobile device loggers and laptop rentals, the daily labour rate, transport costs and other costs necessary to carry out the surveys. The costing template is provided in Excel and must be completed, printed and submitted as part of the tender. It is important and mandatory to ensure that all costs necessary to carry out the surveys as specified are included in the pricing schedule.

**Annexure “B”:** *Pricing template for household travel survey costing based on sample size.*

#### **4 PROPOSAL SPECIFICATION**

The CSIR seeks to appoint service provider(s) with extensive experience in primary transport and or other social survey data collection to carry out field household surveys and data capturing for the City of Johannesburg.

##### **4.1 Scope of Work**

The service provider must visit a number of households from a pre-determined list of sampled households for enumeration with a digital data logger or a similar device for each visiting point. A single questionnaire for each household in the sample size will be enumerated and completed.

The household survey must record the following:

- **Household information**
- **Particulars of each persons in the household**
- **Employment (business) participation**
- **Learner (Educational travel needs)**
- **Personal trip information for each persons in the household**
- **Attitudes / perceptions towards particular modes of mobility**

The following is expected to constitute a deliverable for each household successfully enumerated:

- **Accurately completed questionnaires for each pre-identified number of households in a region within the Gauteng Province**

The service provider is required to survey all the estimated sampled households within a municipality. The number of households provided in the costing template represents a definitive scope and the successful bidder must within 4 weeks, provide an inception report as well as pilot the survey and provide a detailed survey plan based on the timeframes given by the CSIR. The project timeframes are from the **December 2018** to the **31<sup>st</sup>** of March **2019**. Public holidays and other non-normal days are excluded. The survey will be limited to normal days.

**The successful service provider should meet the following requirements:**

1. Experience in conducting transport and or other social field surveys;
2. Experience in administering, supervising and monitoring of transport and or other social field surveys;
3. The successful service provider is further required to make all logistical arrangements for the surveys;
4. Must have access to resources required for the effective execution of the surveys. Resources include the correct number of digital data loggers to accurately collect household responses, survey staff and laptops;
5. Survey staff should preferably be in possession of basic computer skills; and
6. Survey staff must be willing to work for extended hours.
7. The service provider must provide their own Occupational Health and Safety plan.
8. A contingency plan for unforeseen circumstances is the sole responsibility of the service provider

A digitally captured and submitted questionnaire.

## 4.2 Required information

### a) Company Experience

- Provide company profile showing proof of the number of years the company has been involved in conducting transport or similar social surveys.
- Provide letters from clients as proof of previous work completed on transport or similar social survey projects. These must confirm experience of administering, supervising and monitoring of transport or similar social surveys.

### b) Company Resources

- Human resource capacity - Provide a realistic plan on how enumerators are going to be recruited, trained, and deployed. The field survey enumerators must have a South African ID; experience in survey data collection; and basic computer skills.
- Technical resource capacity - Provide a realistic plan on how data collection and capturing instruments i.e. Handheld digital data collection technology (E.g. Etrax or GARMIN) devices and laptops are going to be sourced.

### c) Survey Project Approach/Methodology

- Survey Execution - Provide a clear and concise explanation of the methodology to be followed for survey execution.
- Risk and Quality Management - Identify and explain the potential project risks and propose mitigation actions in order to meet project milestones. Explain how the project quality objectives and requirements will be achieved;
- Project Plan - Show how resources will be effectively and optimally allocated to execute the survey within the allocated time frames using a Gantt chart in line with timelines provided. This plan should also include the training schedule of enumerators, pilot survey period, and contingency plan.

- It is important that the methodology illustrates how local members of the community will be used in the execution of the field work project.

d) Pricing Schedule Template

Complete and submit a hardcopy of the Pricing Schedule Template (**Annexure “B”**) indicating the costing for all project resources.

## 5 FUNCTIONAL EVALUATION CRITERIA

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

*Table 2: Functional Criteria*

<b>Functional Criteria for appointment of a service provider to conduct public transport surveys</b>		
<b>Main Category</b>	<b>Criteria</b>	<b>Score</b>
Competency	Company Experience	20
Company Resources	Human and Technical Resource Capacity	30
Methodology	Project Plan and Survey Execution	50
<b>Total</b>		<b>100</b>

5.2 Proposals with functionality / technical points of less than the pre-determined minimum overall percentage of 60% and less than 40% on any of the individual criteria will be eliminated from further evaluation.

5.3 Refer to **Annexure “A”** for the scoring sheet that will be used to evaluate functionality.

## 6 ELIMINATION CRITERIA

Proposals will be eliminated under the following conditions:

- Submission after the deadline;
- Proposals submitted at incorrect location;
- Incorrect data collection instruments and methods; and
- Non-attendance of the compulsory briefing session

## 7 NATIONAL TREASURY CENTRAL SUPPLIER DATABASE REGISTRATION

Before any negotiations will start with the winning bidder it will be required from the winning bidder to:

- be registered on National Treasury's Central Supplier Database (CSD). Registrations can be completed online at: [www.csd.gov.za](http://www.csd.gov.za);
- provide the CSIR of their CSD registration number; and
- provide the CSIR with a certified copy of their B-BBEE certificate. If no certificate can be provided, no points will be scored during the evaluation process. (RSA suppliers only)

## SECTION B – TERMS AND CONDITIONS

### 8 VENUE FOR PROPOSAL SUBMISSION

All proposals must be submitted at:

- **CSIR GATE 03 - Main Reception Area** (in the **Tender box**) at the following address  
Council for Scientific and Industrial Research (CSIR)  
Meiring Naudé Road  
Brummeria  
Pretoria

### 9 TENDER PROGRAMME

The tender program, as currently envisaged, incorporates the following key dates:

- Issue of tender documents: Friday, 30 November 2018
- Compulsory briefing session: Friday, 07 December 2018
  - Place: CSIR, Pretoria
  - Time: 11:00 -12:00
  - Building: 02
  - Venue: BE-R-2-A103 Executive Boardroom
- Closing / submission Date: Thursday, 20 December 2018
- Estimate appointment date of successful tenderer: Friday, 25 January 2018
- Estimated contract duration: 2 Months

### 10 SUBMISSION OF PROPOSALS

10.1 All proposals are to be sealed. No open proposals will be accepted.



10.2 All proposals are to be clearly marked with the RFP number and the name of the tenderer on the outside of the main package. Proposals must consist of two parts, each of which is placed in a separate sealed package clearly marked:

**PART 1:** Technical Proposal: RFP No.: 3254/20/12/2018.

**PART 2:** Pricing Proposal, B-BBEE and other Mandatory Documentation:  
RFP No.: 3254/20/12/2018.

10.3 Proposals submitted by companies must be signed by a person or persons duly authorised.

10.4 The CSIR will award the contract to qualified tenderer(s)' whose proposal is determined to be the most advantageous to the CSIR, taking into consideration the technical (functional) solution, price and B-BBEE.

## 11 DEADLINE FOR SUBMISSION

Proposals shall be submitted at the address mentioned above no later than the closing date of **Thursday, 20 December 2018** during CSIR's business hours. The CSIR business hours are between 08h00 and 16h30.

Where a proposal is not received by the CSIR by the due date and stipulated place, it will be regarded as a late tender. Late tenders will not be considered.

## 12 AWARDING OF TENDERS

12.1 Awarding of tenders will be published on the National Treasury e-tender portal or the CSIR's tender website. No regret letters will be sent out.

## 13 EVALUATION PROCESS

### 13.1 Evaluation of proposals

All proposals will be evaluated by an evaluation team for functionality, price and B-BBEE. Based on the results of the evaluation process and upon successful negotiations, the CSIR will approve the awarding of the contract to successful tenderers.

A two-phase evaluation process will be followed.

- The first phase includes evaluation of **elimination** and **functionality criteria**,
- The second phase includes the evaluation of **price** and **B-BBEE** status.

Pricing Proposals will only be considered after functionality phase has been adjudicated and accepted. Only proposals that achieved the specified minimum qualification scores for functionality will be evaluated further using the preference points system.

### 13.2 Preference points system

The **80/20** preference point system will be used where **80** points will be dedicated to price and **20** points to B-BBEE status.

## 14 PRICING PROPOSAL

- 14.1 Pricing proposal must be cross-referenced to the sections in the Technical Proposal. Any options offered must be clearly labelled. Separate pricing must be provided for each option offered to ensure that pricing comparisons are clear and unambiguous.
- 14.2 Price needs to be provided in South African Rand (excl. VAT), with details on price elements that are subject to escalation and exchange rate fluctuations clearly indicated.
- 14.3 Price should include additional cost elements such as freight, insurance until acceptance, duty where applicable.
- 14.4 Only firm prices\* will be accepted during the tender validity period. Non-firm prices\*\* (including prices subject to rates of exchange variations) will not be considered.

*\*Firm price is the price that is only subject to adjustments in accordance with the actual increase or decrease resulting from the change, imposition, or abolition of customs or excise duty and any other duty, levy, or tax which, in terms of a law or regulation is binding on the contractor and demonstrably has an influence on the price of any supplies, or the rendering costs of any service, for the execution of the contract;*

*\*\*Non-firm price is all prices other than "firm" prices.*

14.5 Payment will be according to the CSIR Payment Terms and Conditions.

## **15 VALIDITY PERIOD OF PROPOSAL**

Each **proposal** shall be valid for a minimum period of three (3) months calculated from the closing date.

## **16 APPOINTMENT OF SERVICE PROVIDER**

16.1 The contract will be awarded to the tenderer who scores the highest total number of points during the evaluation process, except where the law permits otherwise.

16.2 Appointment as a successful service provider shall be subject to the parties agreeing to mutually acceptable contractual terms and conditions. In the event of the parties failing to reach such agreement CSIR reserves the right to appoint an alternative supplier.

16.3 Awarding of contracts will be announced on the National Treasury website and no regret letters will be sent to unsuccessful bidders.

## **17 ENQUIRIES AND CONTACT WITH THE CSIR**

Any enquiry regarding this RFP shall be submitted in writing to CSIR at [tender@csir.co.za](mailto:tender@csir.co.za) with **“RFP No 3254/20/12/2018 - The provision of transport and or other social survey services for a predetermined number of households in the City of *Johannesburg*”** as the subject.

Any other contact with CSIR personnel involved in this tender is not permitted during the RFP process other than as required through existing service arrangements or as requested by the CSIR as part of the RFP process.

## **18 MEDIUM OF COMMUNICATION**

All documentation submitted in response to this RFP must be in English.

## **19 COST OF PROPOSAL**

Tenderers are expected to fully acquaint themselves with the conditions, requirements and specifications of this RFP before submitting proposals. Each tenderer assumes all risks for resource commitment and expenses, direct or indirect, of proposal preparation and participation throughout the RFP process. The CSIR is not responsible directly or indirectly for any costs incurred by tenderers.

## **20 CORRECTNESS OF RESPONSES**

- 20.1 The tenderer must confirm satisfaction regarding the correctness and validity of their proposal and that all prices and rates quoted cover all the work/items specified in the RFP. The prices and rates quoted must cover all obligations under any resulting contract.
- 20.2 The tenderer accepts that any mistakes regarding prices and calculations will be at their own risk.

## **21 VERIFICATION OF DOCUMENTS**

- 21.1 Tenderers should check the numbers of the pages to satisfy themselves that none are missing or duplicated. No liability will be accepted by the CSIR in regard to anything arising from the fact that pages are missing or duplicated.
- 21.2 *One hard copy* of each proposal must be submitted. In the event of a contradiction between the submitted copies, the hard copy shall take precedence.
- 21.3 Pricing schedule and B-BBEE credentials should be submitted with the proposal, but as a separate document and no such information should be available in the technical proposal.
- 21.4 If a courier service company is being used for delivery of the proposal document, the RFP description must be endorsed on the delivery note/courier packaging to ensure that documents are delivered to the tender box, by the stipulated due date.

## **22 SUB-CONTRACTING**

- 22.1 A tenderer will not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than **25%** of the value of

the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an exempted micro enterprise that has the capability and ability to execute the sub-contract.

- 22.2 A tenderer awarded a contract may not sub-contract more than **25%** of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an exempted micro enterprise that has the capability and ability to execute the sub-contract.

## **23 ENGAGEMENT OF CONSULTANTS**

The consultants will only be remunerated at the rates:

- 23.1 Determined in the "Guideline for fees", issued by the South African Institute of Chartered Accountants (SAICA); or
- 23.2 Set out in the "Guide on Hourly Fee Rates for Consultants", by the Department of Public Service and Administration (DPSA); or
- 23.3 Prescribed by the body - regulating the profession of the consultant.

## **24 TRAVEL EXPENSES**

- 24.1 Where required, all travel expenses for the CSIR's account, be it directly via the CSIR's travel agent or indirectly via re-imbursements, must be in line with the CSIR's travel policy. The following will apply:
- 24.1.1 Only economy class tickets will be used.
- 24.1.2 A maximum of R1300 per night for accommodation, dinner, breakfast and parking will be allowed.
- 24.1.3 No car rentals of more than a Group B will be accommodated.

## **25 ADDITIONAL TERMS AND CONDITIONS**

- 25.1 A tenderer shall not assume that information and/or documents supplied to CSIR, at any time prior to this request, are still available to CSIR, and shall consequently not make any reference to such information document in its response to this request.
- 25.2 Copies of any affiliations, memberships and/or accreditations that support your submission must be included in the tender.

25.3 In case of proposal from a joint venture, the following must be submitted together with the proposal:

- Joint venture Agreement including split of work signed by both parties;
- The original or certified copy of the B-BBEE certificate of the joint venture;
- The Tax Clearance Certificate of each joint venture member;
- Proof of ownership/shareholder certificates/copies; and
- Company registration certificates.

25.4 An omission to disclose material information, a factual inaccuracy, and/or a misrepresentation of fact may result in the disqualification of a tender, or cancellation of any subsequent contract.

25.5 Failure to comply with any of the terms and conditions as set out in this document will invalidate the Proposal.

## **26 CSIR RESERVES THE RIGHT TO**

26.1 Extend the closing date;

26.2 Verify any information contained in a proposal;

26.3 Request documentary proof regarding any tendering issue;

26.4 Give preference to locally manufactured goods;

26.5 Appoint one or more service providers, separately or jointly (whether or not they submitted a joint proposal);

26.6 Award this RFP as a whole or in part;

26.7 Cancel or withdraw this RFP as a whole or in part.

## **27 DISCLAIMER**

This RFP is a request for proposals only and not an offer document. Answers to this RFP must not be construed as acceptance of an offer or imply the existence of a contract between the parties. By submission of its proposal, tenderers shall be deemed to have satisfied themselves with and to have accepted all Terms & Conditions of this RFP. The CSIR makes no representation, warranty, assurance, guarantee or endorsements to tenderer concerning the RFP, whether with regard to its accuracy, completeness or otherwise and the CSIR shall have no liability towards the tenderer or any other party in connection therewith.

**28 DECLARATION BY TENDERER**

**Only tenderers who completed the declaration below will be considered for evaluation.**

**RFP No: 3254/20/12/2018.**

I hereby undertake to render services described in the attached tendering documents to CSIR in accordance with the requirements and task directives / proposal specifications stipulated in RFP **No. 3254/20/12/2018** at the price/s quoted. My offer/s remains binding upon me and open for acceptance by the CSIR during the validity period indicated and calculated from the closing date of the proposal.

I confirm that I am satisfied with regards to the correctness and validity of my proposal; that the price(s) and rate(s) quoted cover all the services specified in the proposal documents; that the price(s) and rate(s) cover all my obligations and I accept that any mistakes regarding price(s) and rate(s) and calculations will be at my own risk.

I accept full responsibility for the proper execution and fulfilment of all obligations and conditions devolving on me under this proposal as the principal liable for the due fulfilment of this proposal.

I declare that I have no participation in any collusive practices with any tenderer or any other person regarding this or any other proposal.

I accept that the CSIR may take appropriate actions, deemed necessary, should there be a conflict of interest or if this declaration proves to be false.

I confirm that I am duly authorised to sign this proposal.

NAME (PRINT) .....  
CAPACITY .....  
SIGNATURE .....  
NAME OF FIRM .....  
DATE .....

WITNESSES	
1	.....
2	.....
DATE: .....	

## 29 ANNEXURE A: SCORE SHEET TO EVALUATE FUNCTIONALITY

<b>1.Company Experience</b>					
<b>Category Weighting</b>	<b>Criteria</b>	<b>Criteria Weighting</b>	<b>Sub-Criteria</b>	<b>Description</b>	<b>Score</b>
20%	Projects	15%	Provide proof of executing transport survey projects. Provide evidence of administering, supervising and monitoring of transport and or similar social surveys	More than five letters with contactable clients should be provided stating that the company has performed work of this nature and the value of the project.	10
				Three to five letters of contactable client should be provided stating that the company has performed work of this nature and the value of the project.	6
				Less than three letters of contactable client.	0
	Company Experience	5%	Provide proof of the number of years the company has been involved in conducting transport and or similar social surveys	Greater than five years' experience in conducting transport field surveys	10
				Three to five years' experience in conducting transport field surveys	6
				Less than 3 years' experience in conducting transport field surveys.	0



<b>2.Company Resources</b>					
<b>Category Weighting</b>	<b>Criteria</b>	<b>Criteria Weighting</b>	<b>Sub-Criteria</b>	<b>Description</b>	<b>Score</b>
30%	Human resource capacity	20%	Minimum human resource capacity	Provided a <u>realistic</u> plan on how enumerators are going to be recruited, trained, and deployed. The field surveyors must have a South African ID.	10
				Provided <u>sufficient</u> detailed plan on how enumerators are going to be recruited, trained and deployed, The plan is achievable.	6
				Plan lacks detail and is insufficient.	0
	Technical resource capacity	10%	Data collection and capturing instruments Handheld GPS devices, laptops	Provided a realistic plan on how data collection and capturing instruments are going to be sourced. Already in possession of the required data collection and capturing instruments (GPS devices and laptops)	10
				Plan is sufficient on how data collection and capturing instruments are going to be sourced.	6
				Does not provide a clear and sufficient plan on how data collection and capturing instruments are going to be sourced.	0

<b>3. Survey Project Approach</b>					
<b>Category Weighting</b>	<b>Criteria</b>	<b>Criteria Weighting</b>	<b>Sub-Criteria</b>	<b>Description</b>	<b>Score</b>
50%	Methodology and survey execution	20%	Demonstrate thorough understanding of the objectives and deliverables as outlined in the scope of work The methodology must cover, amongst other things, transport and or similar social surveys	Provides a <u>detailed</u> approach/methodology that will be used in order to deliver in line with the requirements stated above.	10
				Provides a <u>summary</u> satisfactory approach/methodology that will be used in order to deliver in line with the requirements stated above. The approach is achievable.	6
				Approach does not provide detail and is not achievable.	0
	Project plan	20%	Provide project programme using Gantt charts.	Programme is detailed and realistic. The programme consists of <u>clear</u> time lines and project milestones.	10
				The programme provides <u>sufficient</u> time lines and project milestones.	6
				The programme lacks clear timelines and project milestones	0
	Risk and Quality Management	10%	Risk and Quality Management Plan to identify and explain the potential project risks and propose contingencies and or mitigation necessary to meet project milestones.	Risk and quality management plan is detailed and realistic.	10
				Provided <u>sufficient</u> detail in the risk and quality management plan	6
				Does not provide a <u>clear</u> and sufficient risk and quality management plan	0

**END OF RFP**