
TERMS OF REFERENCE FOR THE APPOINTMENT OF A SERVICE PROVIDER TO DEVELOP AND MAINTAIN ASSETS MANAGEMENT SYSTEM FOR A PERIOD OF 36 (THIRTY-SIX) MONTHS.

1. BACKGROUND

- 1.1. The Department of Mineral and Petroleum Resources seeks to appoint a Commercial Off-the-Shelf (COTS) Movable Asset Management System to automate and enhance the end-to-end management of departmental asset. The TOR outlines the scope of work, functional and non-functional requirements, deliverables, service expectation, contract duration and evaluation criteria for the appointment of a suitable service provider.
- 1.2. This TOR is informed by the Business Requirement Specification (BRS is attached as **Annexure A**). The Department currently uses a combination of legacy tools and Excel based registers to manage movable assets. The limitations of the current environment such as manual processing, segmentation of information, lack of automated verification and inconsistencies have negatively affected efficiency, accuracy and compliance with the PFMA. The assets are located at the region office all in all provinces.
- 1.3. The department requires a robust, automated, user friendly asset management system that:
 - Supports the full lifecycle of movable assets.
 - Enhances transparency, traceability and auditability.
 - Reduces manual errors and human intervention.
 - Provides real-time reporting and dashboard.
 - Ensure compliance with PFMA, Treasury Regulation.
 - Integrate with existing systems where necessary.

2. CONTRACT PERIOD

- 2.1. The expected duration of the contract is for a period of thirty-six (36) months, of which twelve (12) months will be for the implementation of the system and twenty-four (24) months is for the support and maintenance of the system, this period will start after the signing of the service level agreement.

3. OBJECTIVE

- 3.1 The objective of this project is for the DMPR to track and monitor department's assets, through an efficient digital register.

3.1.1 The objectives of the project include:

- Automate the asset management lifecycle from acquisition to disposal.
- Improve accuracy, accountability and integrity of the assets register.
- Enable efficient asset verification using scanning devices.
- Provide real-time tracking of asset location, user assignment and condition and usage status.
- Provide automated alerts, reminders and reporting.
- Ensure compliance with PFMA, Treasury regulations and internal policies.
- Offer user training, manuals and ongoing technical support.

4. SCOPE OF WORK

4.1. The successful service provider is expected to do the following:

- 4.1.1. Supply and configure an off-the-shelf Assets Management system. The system must comply with all functional and non-functional requirements as listed in the BRS.
- 4.1.2. Develop an Assets Register featuring capabilities for adding, updating and deleting asset items.
- 4.1.3. Transfer of Assets item.
- 4.1.4. Disposal of assets item.
- 4.1.5. Write off or replacement of loss assets item.
- 4.1.6. Conduct assets verification
- 4.1.7. Generate various reports.
- 4.1.8. System implementation
 - Installation and configuration as per DMPR standards
 - Setup user roles, permissions and security
 - Data cleansing and migration from existing sources
- 4.1.9. Supply scanning devices
 - Provide handheld scanners capable of functioning offline and synchronize data when connected to a network.
- 4.1.10 Testing and Deployment
 - Conduct thorough testing to ensure the system's reliability, security and compliance before full deployment.
- 4.1.11 Training and knowledge transfer
 - Provide training for both the users and administrators to ensure smooth adoption of the system.
- 4.1.12 Maintenance and Support is for a period of twenty-four (24) months, including:

- Bug fixes
- Enhancements and/or updates

4.1.13 Skills Transfer

- Internal resources to be trained in the maintenance of the system.

4.1.14 Integration

- Integrate the Assets Management system with the existing Departmental system.

4.2 FUNCTIONAL REQUIREMENTS

4.1.1 The system must comply with all requirements detailed in Section 2 of the Assets Management BRS document. Key mandatory features include but not limited to:

- User and permission management. Role based access, segregation of duties, authorization levels.
- Audit trail and activity logging. Provide comprehensive logs for all actions and user events.
- Asset creation and bulk uploads. Capability for single and bulk capture of assets, validations and templates.
- Asset allocation, transfer and movement of assets. User assignment, room assignment, building and site assignment, transfer workflows and tracking history.
- Notification and dashboard. The system should enable email alerts for pending action, task lists, overdue task and warranty expiry notifications. Enable a dashboard for the summary of the assets within the department.
- Document uploads. Capable to upload supporting documents i.e., purchase order and invoices and pictures of assets.
- Asset verification and scanning. Scanners should be able to, in real-time synchronize verification data into the asset register, detect discrepancies and flag for investigation and reporting.
- Disposal Management. Manage the disposal of assets.
- Report generation. Capable of generating reports relevant to operational, audit and treasury regulations and depicted in the BRS

5 DELIVERABLES OR PROJECT OUTPUT AND/OR OUTCOME

5.1 The successful service provider is expected to perform the following activities with clear deliverables:

5.1.1 Project plan with timelines.

5.1.2 Fully installed and configured system.

- 5.1.3 Data cleansing and migration.
- 5.1.4 Scanners and applicable hardware delivered.
- 5.1.5 User acceptance testing report.
- 5.1.6 Comprehensive user and technical documentation:
 - Functional Specification Document
 - Technical Specification Document
 - Entity Relationship Diagram
 - User Manual
- 5.2 Training manuals and training completion report outlining the system's features.
- 5.3 System go-live report.
- 5.4 Maintenance and support plan.
- 5.5 SLA agreement and compliance reporting.
- 5.6 Source code and control

6 EVALUATION CRITERIA

NB: This bid will be evaluated in three stages, i.e. functionality, administrative compliance and point scoring system.

6.1 Gate 01 – Mandatory requirements

- (i) Not applicable

6.2 Gate 02 – Functionality

Bidders will be scored in terms of the functional requirements indicated in the table below. The corresponding points and weightings will be used to calculate the overall score a bidder has achieved. The minimum threshold for this bid is **70%**. Bidders who score less than **70%** will be disqualified. Only bidders that score **70%** and more will be considered further.

No.	Evaluation criteria	Points	Weight
1.	Company Experience Company experience should have experience of having undertaken similar projects (Attach completion letters/certificates or testimonials with contactable references to account for experience) Service provider should indicate experience in successful execution of the following streams: 1.1 Implementation of Asset Management System. 1.2 Post implementation and support of proposed Solution. Testimonials will also be relied upon to proof experience in supporting Asset Management Solutions.	7 years or more = 5 points 6 years = 4 points 5 years = 3 points 4 years = 2 points 3 years or less = 1 point 7 years or more = 5 points 6 years = 4 points 5 years = 3 points 4 years = 2 points 3 years or less = 1 point	25 20 5
2.	Team Leaders Experience: (i) Team Leader must demonstrate proven experience in successfully delivering projects related to the development and implementation of asset management systems. (ii) The Team Leader must demonstrate proven experience in effectively leading project teams in the implementation and operationalization of asset management solutions.	6 or more projects = 5 points 5 projects = 4 points 4 projects = 3 points 3 projects = 2 points 2 or less projects = 1 point No indication = 0 points 6 or more projects = 5 points 5 projects = 4 points 4 projects = 3 points 3 projects = 2 points 2 or less projects = 1 point No indication = 0 points	40 15 15

No.	Evaluation criteria	Points	Weight
	Team Members Experience: (iii) Team members must comprise minimum of three (3) members (i.e., Database, Applications, Configuration and Server Administration). Individual team members must have at least five (5) years practical experience in implementation, maintenance and support experience working in design and implementation of the proposed solution CV's must be attached as proof. Extensive knowledge and experience in supporting and troubleshooting applications. (Attach a detailed CV highlighting experience with contactable references)	Seven or more years of experience = 5 points Six years of experience = 4 points Five years' experience = 3 points Three to four years' experience = 2 points Two years or less of experience = 1 No indication = 0 points (Years of experience shall be determined by calculating the average years of experience of all proposed team members)	10
3.	Qualifications: <u>Team Leader Qualifications</u> (i) Team leader must have a formal relevant tertiary qualification in Information Technology, Information Systems or Computer Sciences recognised by SAQA (Attach certified copies of relevant qualification/s not older six (6) months)	NQF level 8 = 5 points NQF level 7 = 4 points NQF level 6 = 3 points Below NQF level 6 = 2 points No qualification = 0 points NQF level 7 = 5 points	20

No.	<i>Evaluation criteria</i>	<i>Points</i>	<i>Weight</i>
	Team Member Qualifications (ii) Team members must comprise of three (3) members and must possess formal relevant Information Technology, Information Systems or Computer Sciences recognised by SAQA (Attach certified copies of relevant qualification/s)	NQF level 6 = 4 points NQF level 5 = 3 points Below NQF level 5 = 2 points (Number of projects = average of the team members)	10

No.	Evaluation criteria	Points	Weight
4.	Project Plan (i) Detailed project plan with ➤ Project deliverables ➤ Logistics plan ➤ Key milestones ➤ Scope ➤ Schedule ➤ Contingencies (Attach project plan) based on scope on paragraph 4. (ii) Proposed Methodology outline. ➤ Management of the project. (Attach methodology proposal)	Detailed project plan with project deliverables that covers the entire scope and detailed logistics plan, milestones, scope, schedule, cost, resources & change management plan = 5 points Project Plan does not cover the scope or No project plan submitted = 0 points Methodology outlining management of project = 5 points Methodology not provided = 0 point	10 5 5
5.	Proposed training plan for DMPR staff (Skill Transfer)	Detailed Proof of capability to Transfer skill =5 points Non submission of proof of capability Transfer skill not provided=0 point	5
	Total		100

Formula; $\frac{A}{B} \times 100 = C\%$

Where:

- A = Total score for the bid under consideration
- B = Maximum possible score
- C = Percentage score for the bid under consideration

6.3 Gate 03 - Administrative compliance

- (i) Compliance to the specification / Terms of Reference.
- (ii) Fully completed SBDs (Duly signed and dated) listed hereunder
 - SBD 1
 - SBD 4
 - SBD 6.1
- (iii) The following will be regarded as noncompliance.
 - Price amendments / other amendments without signature/initials.
 - Use of correctional fluid
 - Completion of the bid document in coloured ink other than black ink

6.4 Gate 04 – Point Scoring System

Bids will be evaluated on the 80/20 preference point system as outlined in the Preferential Procurement Regulation of 2022.

- Price points = 80
- Preferential points = 20

6.4.1 The bidder that scores the highest points in this phase will be awarded the tender.

6.4.2 Should more than one bidder score the same number of points; the award will be made to the bidder who scores more points on specific goals.

6.4.3 Should there be more than one bidder who score the same number of points overall and the same points on specific goals, the award will be made to the bidder who scored the highest points on functionality.

6.4.4 Should there be more than one bidder who score the same number of points in all aspects, the bid will be determined by the drawing of the lot.

6.4.5 The preferential points will be allocated in terms of the Departmental objectives on specific goals. Points allocation on specific goals are tabulated hereunder.

6.4.6 Bidders who do not submit proof (means of verification) of specific goals claimed will not qualify for preference points for specific goals.

Specific Goal	Number of points (80/20 Preference System)	Means of Verification
An enterprise owned by Black people	4	Identity documents and the CIPC document

Enterprise owned by Women	4	Identity documents and the CIPC document
Enterprise owned by Youth	4	Identity documents and the CIPC document
An enterprise owned by disabled persons	4	Medical certification
Enterprise owned by SMMEs (QSE or EME)	4	B-BBEE certificate issued by a SANAS-accredited Agency or DTIC, or a Sworn affidavit

NB: “Ownership = 51% of the company share. Designated group/person that are part of the entity directorship but have less than 51% share = points will be calculated on a pro-rata basis in relations to the share/s held by the designated group/persons.

E.g. Number of women directors	= 01
Shares owned by women	= 20%
Specific goal for women	= 4 points
Points claimable for women ownership	= $\frac{20}{100} \times 4 = 0.8 \text{ points}$

7 REPORTING REQUIREMENTS

7.1 Report Generation & Export

The system must:

- Allow users to generate different types of reports.
- Enable users to apply filters or parameters (e.g., date ranges, asset categories, locations, statuses, etc.) when generating reports.
- Support exporting all reports in CSV, PDF and Excel formats.

7.2 Automated Calculations

The system must:

- Perform automated calculations as part of report generation or data processing.
- Use predefined formulas, business rules, or user-specified input values to carry out these calculations.
- Ensure that these automated calculations support accurate data processing and help users in making decisions.

7.3 Types of Required Reports

The system must provide the following reports at minimum:

- Procured Asset Report
- Unauthorized Asset Movement Report
- Disposal Report
- Lost Asset Report
- Assets on Loan Report
- Assets Out for Repairs/Maintenance Report
- Interim Financial Reports
- Annual Financial Reports
- List of Assets by Category Report

Additional report details and specifications can be found in the Business Requirements Specification (BRS) document.

8 WORK PLAN AND METHODOLOGY

8.1 The service provider must provide:

- 8.1.1 A project proposal that demonstrates comprehension and competence to deliver on what is required in line with the scope of work under section 4.
- 8.1.2 A preliminary project plan outlining key activities, milestones, timeframes and resources to be committed to the project.

9 ROLE AND RESPONSIBILITY

- 9.1 Service Level Agreement will be entered into with the successful service provider which will include, *inter alia*, obligations of the DMPR and the successful service provider.
- 9.2 The DMPR reserves the right to appoint more than one service provider for the project.
- 9.3 The successful service provider must develop detailed project schedule/ plan.
- 9.4 The service provider shall disclose all information in its proposal regarding any interests that may result in an actual or perceived conflict of interest.

10 CONFIDENTIALITY OF INFORMATION

- 10.1 The names of all the members of the service provider team must be disclosed for the prior approval of DMPR. Any changes, replacements, and additions should be submitted for prior approval of DMPR.
- 10.2 All members will have to sign a Non-Disclosure Agreement before project commencement and may be required to undergo security screening and tests as the DMPR deems necessary.

11 **PAYMENT**

- 11.1 The Department will not make an upfront payment to a successful service provider. Payment will only be made in accordance with the delivery of service that will be agreed upon by both parties and upon receipt of an original invoice.

12 **TAX CLEARANCE CERTIFICATE**

- 12.1 Bidders must ensure compliance with their tax obligations.
- 12.2 Bidders are required to submit their unique personal identification number (pin) issued by SARS to enable the state organ to view the taxpayer's profile and tax status.
- 12.3 Application for tax compliance status (TCS) or PIN may also be made via e-filing. In order to use this provision, taxpayers will need to register with SARS as e-filers through the website www.sars.gov.za.
- 12.4 A bidder may also submit a printed TCS together with the proposal.
- 12.5 In proposals where consortia / joint ventures / sub-contractors are involved, each party must submit separate proof of TCS / PIN / CSD number.
- 12.6 Where no TCS is available, but the bidder is registered on the central supplier database (CSD), a CSD number must be provided.

13 **COST / PRICING**

- 13.1 The bidders are requested to provide a quoted proposal regarding the work to be undertaken.
- 13.2 Bidders are required to indicate a ceiling price based on the total estimated time for completion of all phases and including all expenses, inclusive of all applicable taxes for the project. The total cost must be VAT inclusive and should be quoted in South African Rands (i.e. ZAR).
- 13.3 Bidders should provide hourly rates as prescribed by the Department of Public Service and Administration (DPSA), Auditor-General (AG), or the body regulating the profession of the consultant.
- 13.4 Bidders should provide (Subsistence & Travel (S&T)) rates that are aligned to the National Treasury instruction note as follows:
- i) Hotel Accommodation – R1700 per night per person, including breakfast, dinner, and parking.
 - ii) Air travel must be restricted to economy class.
 - iii) Claims for kilometres may not exceed the rates approved by the Automobile Association of South Africa.

14 **CONDITIONS OF THE CONTRACT**

- 14.1 The General Conditions of Contract must be accepted as these are issued by the National Treasury and are non-negotiable.
- 14.2 The successful service provider will sign a confidentiality agreement regarding the protection of DMPR information that is not in the public domain.
- 14.3 No state information may be furnished/ communicated to the public or news media by the security service provider or any of their employees.
- 14.4 The successful service provider shall ensure that the contract is executed in line with the scope of work.
- 14.5 The successful service provider may be subjected to security screening by the State Security Agency.
- 14.6 The DMPR reserves the right to verify the authenticity of the information submitted; any falsified information may result in the disqualification or cancellation of the contract.

15 **FORMAT OF SUBMISSION OF PROPOSAL**

- 15.1 Bidders are requested to submit two copies of the technical proposals, plus the original.
- 15.2 Bidders are requested to index their proposals for easy reference.

16 **PRE-BID MEETING / BRIEFING SESSION DETAILS**

- 16.1 A non-compulsory briefing session will be held on **12 January 2026 at 10:00**, through **Microsoft Teams**.
Meeting ID: 314 523 138 488 07
Passcode: Ns6qP9ib

17 **CLOSING DATE**

- 17.1 Proposals must be submitted on or before **16 January 2026 at 12:00** at the Department of Mineral and Petroleum Resources, at Building 2B, Trevenna Campus, C/O Meintjies and Francis Baard Street, Sunnyside, Pretoria, in the bid box marked Department of Mineral and Petroleum Resources (DMPR). **No late bids will be accepted.**

18 **ENQUIRIES**

18.1 **All general enquiries relating to bid documents should be directed to:**

Ms. Lucia Nkhethoa/ Ms Nonhlanhla Zingwevu

Tel No: (012) 444 3778/ 3055

E-mail: Lucia.Nkhethoa@dmpr.gov.za / Nonhlanhla.Zingwevu@dmpr.gov.za

18.2 **Technical enquiries can be directed to:**

Mr. Kgoroshi Malefo

Tel No: 012 444 3086

E-mail: Kgoroshi.Malefo@dmpr.gov.za

Mr. Sello Maluleka

Tel No: (012) 444 3064

E-mail: Sello.Maluleka@dmpr.gov.za