



UOMA
Used Oil Management
Associations of Canada

Request for Proposals

National Survey and Study of the Lubricating Oil and Antifreeze Packaging Circular Economy

Issue Date: **October 2, 2019**

Closing Date and Time: **November 4th, 2019, 4:00 PM (BC Time)**

Closing Location for Proposals: **By email to
David Lawes - DLawes@usedoilrecycling.ca**

Proponents' Meeting:

Held by teleconference only
October 17th, 2019 at 10:00 AM (BC Time)
Toll free: 1-877-385-4099
Participant code: 7312588 #

*Proponents should email the inquiries
Contact Person in advance indicating their
intention to participate.*

Inquiries Contact Person:

By email only to
David Lawes - DLawes@usedoilrecycling.ca

E-mail subject line reference:
"RFP Inquiry–Packaging Study"



Table of Contents

I.	Summary of the Requirement.....	1
II.	Definitions and Administrative Requirements.....	1
III.	Intended Schedule	2
IV.	UOMA Background.....	2
V.	Study Background	3
VI.	Project Scope.....	4
VII.	Requirements.....	6
VIII.	Contract and Term	8
IX.	Proposal Evaluation Criteria.....	8
X.	Guide to Proponent’s Response	9
XI.	Proposal Format.....	10

[Appendix A:](#) Proposal Covering Letter

[Appendix B:](#) Administrative Requirements



I. Summary of the Requirement

This Request for Proposals (RFP) is seeking a qualified firm to conduct a national study of the packaging used for Lubricating Oil and Antifreeze products. The study will help to ensure that the members of the Used Oil Management Associations of Canada (UOMA) are prepared for potential imminent changes in the standards for product packaging.

The goals of this study are to understand:

- The Lubricating Oil and Antifreeze packaging supply chain from the design and manufacturing stage to the post-consumer stage (reuse/recycling/energy recovery);
- The volumes and key players in each stage; and
- The current and emerging trends in product packaging.

II. Definitions and Administrative Requirements

1. Definitions

Throughout this Request for Proposals, the following definitions apply.

- 1.1 **"Closing Date"** means the date and time indicated on the cover page of this RFP;
- 1.2 **"Closing Location"** means the closing location for Proposals indicated on the cover page of this RFP;
- 1.3 **"Contact Person"** means the contact person identified on the cover page of this RFP;
- 1.4 **"Contract"** means the written agreement resulting from this RFP executed by the BC Used Oil Management Association (acting on behalf of the UOMA) and the successful Proponent;
- 1.5 **"Contractor"** means a successful Proponent to this RFP who enters into a written Contract with the BC Used Oil Management Association (acting on behalf of the UOMA);
- 1.6 **"must" or "mandatory"** means a requirement that must be met in order for a Proposal to receive consideration under the RFP;
- 1.7 **"Proponent"** means an individual or a company that submits, or intends to submit, a Proposal in response to the RFP;
- 1.8 **"Proposal"** means a Proponent's written response to the RFP;
- 1.9 **"Request for Proposals" or "RFP"** means this document and any addenda;



- 1.10 “**should**” or “**desirable**” means a requirement having a significant degree of importance to the objectives of the RFP; and
- 1.11 “**UOMA**” means the Used Oil Management Associations of Canada.

2. Administrative Requirements

The Administration Requirements related to this RFP are provided in [Appendix B](#).

III. Intended Schedule

The RFP process is expected to follow the schedule below. The timing and sequence of events resulting from this RFP may vary as ultimately determined by the UOMA.

Date	Milestone Event
October 2 nd , 2019	RFP issued
October 16 th , 2019	Deadline for RSVP and inquiries for teleconference
October 17 th , 2019	Proponents’ teleconference (Proponent inquiries addressed)
November 4 th , 2019	RFP closes
November 5 th , 2019	Proponents notified of final results
November 12 th , 2019	Contract finalized

IV. UOMA Background

In 1988, the Canadian Council of Ministers of the Environment (CCME) identified used oil as Canada’s largest single-source of potentially hazardous material if not properly managed. It subsequently requested that the industry, through the Canadian Petroleum Products Institute (CPPI), renamed Canadian Fuels Association (CFA), address the issue.

The CPPI established the Used Oil Task Force which culminated in the 1991 Montreal Meeting where the recycling focus shifted from the government to sellers of lubricating products.

Subsequently, the Western Canadian Used Oil/Container/Filter Industry Task Force realized the importance of harmonizing the collection of used oil materials across western Canada. From this grew the Extended Producer Responsibility (EPR) program model currently used in eight Canadian provinces.



The following provincial recycling associations currently hold membership in the UOMA:

- British Columbia Used Oil Management Association (BCUOMA)
- Alberta Recycling Management Authority (ARMA)
- Saskatchewan Association for Resource Recovery Corp. (SARRC)
- Manitoba Association for Resource Recovery Corp. (MARRC)
- Société de gestion des huiles usagées (SOGHU)
- UOMA Atlantic – New Brunswick (UOMA NB)
- UOMA Atlantic – Prince Edward Island (UOMA PE)
- UOMA Atlantic – Newfoundland and Labrador (UOMA NL) – membership effective October 1, 2019

Membership under these provincial associations is made up of retailers, wholesalers and first sellers of Lubricating Oil and Antifreeze products.

Inter-provincial cooperation of the provincial recycling associations is formalized through the National Used Oil Material and Antifreeze Advisory Council (NUOMAAAC) which coordinates the Canada-wide used oil and antifreeze materials recycling effort and encourages national standards.

To access information on the specific products managed in each member's province, [click here](#).

V. Study Background

The impetus for the Lubricating Oil and Antifreeze packaging study stems from the continuing focus, in Canada and globally, on addressing the environmental impacts of discarded plastics.

In June 2019, Prime Minister Trudeau shared the government's plan to ban harmful single-use plastics and hold companies responsible for plastic waste, promising waste reduction through actions as early as 2021 and to take other steps to reduce pollution from plastic products and packaging. The government intends to work with provinces and territories to introduce standards and targets for companies that manufacture plastic products or sell items with plastic packaging so they become responsible for their plastic waste. The full government announcement is available at:

<https://pm.gc.ca/eng/news/2019/06/10/canada-ban-harmful-single-use-plastics-and-hold-companies-responsible-plastic-waste>

The Standing Committee on Environment and Sustainable Development also recently released a report to the House of Commons titled, *The Last Straw: Turning the Tide on Plastic Pollution in Canada*. This comprehensive report consulted expert organizations and individuals from across Canada, and highlights a need for coordinated action. The report's recommendations include assessing plastic toxicity through the Canadian Environmental Protection Act, 1999 and fostering



recycling including through funding to encourage innovation and modernization. The report is available at:

<https://www.ourcommons.ca/DocumentViewer/en/42-1/ENVI/report-21>

In late June, the Canadian Council of Ministers of the Environment (CCME) shared a report to outline the first phase of the Canada-wide Action Plan on Zero Plastic Waste, Phase 1, which stems from eight months of research and stakeholder engagement. The plan targets six key priorities similar to those in the Standing Committee report, and lists next steps and deadlines for moving ahead. The CCME announcement and link to the report is available at: https://www.ccme.ca/en/whats_new/article.html?id=111

VI. Project Scope

The scope of the study includes all packaging types of all sizes used in all in-scope provinces (see Table 1. below) for the Lubricating Oil, Antifreeze and other automotive products they manage.

All Canadian associations currently have a 205-litre upper threshold for the mandated products. The primary reason for this threshold is that historically, producers supplying products in 205-litre or greater containers would recover the used containers on delivery in a reverse supply chain system. Some producers have decided to discontinue the reverse supply chain system, which leaves these containers to be managed by the user and may necessitate UOMA support.

The products (summarized below) may be sold using any of the following packaging types or materials, each of which is in the scope of this study:

Packaging Types

Cans; Bottles/Jugs; Bag-in-Box; Stand-up Pouches; Pails; Tubes; Intermediate Bulk Containers (IBC); Kegs and Drums; Others

Packaging Materials

Metal segment: Aluminum; Tin; Steel

Plastic segment: Polyethylene (PE); Polyethylene terephthalate (PET); Polyvinyl chloride (PVC); Polypropylene (PP); Others

Products

Lubricating Oil: Petroleum-derived or synthetic; crankcase, engine and gear oils; hydraulic, transmission and heat transfer fluids; fluids used for lubricating purposes in machinery or equipment

Antifreeze: Automotive antifreeze

Other Automotive Products: Diesel Exhaust Fluid



The following table confirms the geographic scope of the study. Statistics are provided to help demonstrate the approximate scale of Canada’s used oil management industry, including packaging. The data presented is derived from each association’s annual report for its 2018 fiscal year. **The note below the table clarifies limitations on the product ultimately available for collection and processing.**

Table 1. Provincial Association	LUBRICATING OIL Millions of Litres		ANTIFREEZE Millions of Litres		CONTAINERS Millions of Kg*	
	Sold	Collected	Sold	Collected	Sold	Collected
British Columbia Used Oil Management Association (BCUOMA)	97.30	50.60	12.70	2.50	2.10	1.80
Alberta Used Oil Management Association (ARMA)	170.89	84.50	N/A	N/A	2.44	2.30**
Saskatchewan Association for Resource Recovery Corp. (SARRC)	38.09	18.30	3.49	0.26	1.07	0.47
Manitoba Association for Resource Recovery Corp. (MARRC)	27.20	15.60	4.65	0.36	0.72	0.36
Automotive Materials Stewardship ON*** (AMS / RPRA)	N/A	N/A	DNA	2.23	3.28	3.33
Société de gestion des huiles usagées QC (SOGHU)	103.90	62.13	16.12	1.79	2.56	2.27
Atlantic Used Oil Management Association NB (UOMA NB)	14.52	3.61	2.02	0.11	0.49	0.27
Atlantic Used Oil Management Association PE (UOMA PE)	2.13	0.18	0.34	0.02	0.07	0.06
Total		234.80		7.27	12.75	10.82
Newfoundland and Labrador	(DNA) Province is in scope – UOMA membership commences October 2019					
Nova Scotia	(DNA) Province is out of scope					

* includes containers for Lubricating Oil, Antifreeze and Diesel Exhaust Fluid, as applicable to the association.

** containers may include some non-program material.

*** in Ontario, Lubricating Oil is not regulated as Extended Producer Responsibility.



NOTE: A significant proportion of the Lubricating Oil and Antifreeze sold is consumed in use or repurposed by the owner, and therefore unavailable for collection.

VII. Requirements

Information-gathering

The Contractor will conduct surveys and interviews from a life cycle perspective: packaging manufacture, packaging use, and packaging reuse/recycling/energy recovery. The Lubricating Oil/Antifreeze brand owners/manufacturers or “fillers” should be surveyed first to determine the packaging manufacturers that they currently use, and these packaging manufacturers should be included in the survey.

A. Survey key manufacturers (or fillers) of the in-scope products on:

- Packaging types used (and the packaging manufacturers engaged)
- Quantities of product sizes produced by packaging type
- How products are distributed into the market
- Assessment of the recyclability or reusability of each packaging type used
- Trends in packaging, including any planned changes to the packaging types currently used
 - Of specific interest, how will they distribute and sell the products if the Canadian government bans the plastic containers?
- Any other trends or pressures impacting the marketplace

Some key Lubricating Oil and Antifreeze manufacturers and therefore potential survey candidates are:

Rechochem*	Mobil
Pennzoil	Valvoline Inc.
Shell Canada	Petro-Canada
Quaker State	Peak
Imperial Oil Limited	Castrol

*One of Canada’s largest Antifreeze and Diesel Exhaust Fluid distributors.

B. Survey key manufacturers of packaging for the in-scope products on:

- Packaging types manufactured
- Quantities of packaging types manufactured, broken down by size
- How packaging is distributed into the market
- Assessment of the recyclability or reusability of each type of packaging manufactured
- Trends in packaging, including any planned changes to the packaging types currently manufactured



→ Of specific interest, how would they respond (what changes would be made) if the Canadian government bans plastic containers for the products?

- Any other trends or pressures impacting the marketplace

Some key players¹ in the global lubricant packaging market (including Bag-in-Box) and therefore potential survey candidates are:

Amcor Limited (Switzerland)	BAM Packaging (US)
Glenroy, Inc. (US)	Berry Plastics (US)
Graham Packaging (US)	CDF (US)
Mold Tek Packaging (India)	Greif, Inc. (US)
Scholle IPN (US)	SCHÜTZ GmbH & Co., KGaA (Germany)

Some key global players² specific to the evolving pouch packaging market and therefore potential survey candidates are:

Glenroy, Inc. (US)	Icone International Ltd. (UK)
StandUpPouches (US)	Star Packaging Corp. (US)
BAM Packaging Consulting GmbH (Germany)	

C. Survey a cross-section of Canadian recyclers (4) of the in-scope packaging on:

- Packaging types and sizes currently brought to the recycling facilities
- Ability to recycle or reuse each packaging type currently presented
- Referencing any emerging trends identified, ability to support potential changes in packaging materials or designs, or in the event of a reverse supply chain (e.g., Drums)

Key oil and antifreeze container recyclers and therefore required survey candidates are:

Merlin Plastics (Can)	RPM (Can)
-----------------------	-----------

Delivery of Findings

The Contractor will deliver a final report to the UOMA that includes details of the study methodology, the survey participants, and both individual and aggregated responses to the survey questions with key themes highlighted.

¹ Lubricant Packaging Market Research Report - Global Forecast to 2023 (issued November 2018)

² Motor Oil Pouch Packaging Market - Global Industry analysis, Size, Share, Growth, Trend and Forecast 2016 - 2024



Following acceptance of the final report by the UOMA, the Contractor will present the findings at a workshop attended by project stakeholders including representatives of UOMA members and survey participants. It is anticipated that the workshop will be delivered by webinar.

Project Status Reporting

Commencing at the end of November 2019, the Contractor will provide monthly reporting to the UOMA Project Manager on the activities completed and activities planned for the following month. This will help both parties to identify any matters requiring resolution, to verify that the project is on track, and to ensure that activities continually align with the project goals.

VIII. Contract and Term

A successful Proponent under this RFP will be expected to enter into a Contract negotiation with a designated representative of the UOMA. Services under the Contract are expected to commence in November, 2019 and with the report complete by **March 16, 2020**, and the webinar to be held within a month of report completion.

Prior to commencing the Contract, a meeting will be held with the personnel undertaking the study and the UOMA Project Manager to address any final clarifications needed to proceed with the study.

IX. Proposal Evaluation Criteria

1. Mandatory Criteria

Following are mandatory requirements under this RFP. Proposals not clearly demonstrating that they meet these requirements will receive no further consideration during the evaluation process.

Mandatory Criteria

The Proposal must be received at the Closing Location and by the specified Closing Date.

The Proposal must be in English and must be submitted as an email attachment only in Word or PDF format.



2. Desirable Criteria

Proposals meeting the mandatory requirements will be further assessed against the following desirable criteria. Proposals not achieving the minimum score in an individual category (where applicable) will receive no further consideration during the evaluation process.

Desirable Criteria	Points Available	Minimum score (where applicable)
1. Qualifications and Experience – see section X.1	40	24
2. Project Approach / Work Plan – see section X.2	30	18
3. Cost – see section X.3	30	
TOTAL POINTS AVAILABLE	100	

X. Guide to Proponent’s Response

In order to receive full consideration during evaluation of the desirable criteria, Proposals should include detailed responses on all of the following points.

1. Qualifications and Experience

- Provide a one or two-page overview of the Proponent’s firm, including the types of services offered, length of time in business, and significant accomplishments.
- Describe the Proponent’s experience providing services relevant to those described in this RFP. Include specific examples that best demonstrate the Proponent’s experience delivering studies similar to this project.
- Identify the Project Manager and all other key resources (including contracted resources) that would be involved in the project, including their roles. Provide an overview of the qualifications and relevant experience of each of the proposed key resources.

2. Project Approach / Work Plan

- Explain and interpret the services required under this RFP (see [Section VI](#) and [VII](#)).
- Describe the Proponent’s overall methodology and approach to the successful delivery of those services.



- Provide a high-level work plan / timeline for the project that includes the monthly status reporting points.

3. Cost

- Confirm your fixed cost (inclusive of expenses and all applicable taxes) to provide the services identified in [Section VII](#). Include any assumptions you have made to arrive at the cost.

XI. Proposal Format

The following Proposal sequence and instructions should be applied in order to provide consistency in Proponent responses and ensure each Proposal receives full consideration.

- a. Respond by e-mail with subject line reference: “RFP–Packaging Study Proposal”
- b. Include the following attachments in the e-mail (may be submitted as a single attachment or multiple attachments):
 - 1) The signed Proposal covering letter, as set out in [Appendix A](#) of the RFP.
 - 2) The Proposal, beginning with a Table of Contents that includes page numbers.
 - 3) A one or two-page summary of the key features of the Proposal.
 - 4) The Proposal body, preferably presented in the same order as set out in [Section X](#) of the RFP.
 - 5) Appendices: any other information determined by the Proponent to be directly relevant to the RFP requirements, each of which should be reasonable in length.

Appendix A Proposal Covering Letter

(Letterhead or Proponent's name and address)

Date: _____

Used Oil Management Associations of Canada (UOMA)
c/o David Lawes - DLawes@usedoilrecycling.ca

Subject: Packaging Study – Request for Proposals

The enclosed Proposal is submitted in response to the above-referenced Request for Proposals including any addenda and/or clarifying information subsequently provided.

We have carefully read and examined the Request for Proposals and have conducted such other investigations as were prudent and reasonable in preparing the Proposal. We are authorized to submit this Proposal on behalf of the Proponent.

Yours truly,

Signature

Name: _____

Title: _____

Telephone Number: _____

E-mail address: _____

Legal name of Proponent: _____

Appendix B Administrative Requirements

1. Terms and Conditions

The following terms and conditions will apply to the RFP. Submission of a Proposal in response to this RFP indicates acceptance of all the terms that follow and any terms or conditions that may be included in addenda issued by the UOMA.

2. Additional Information about the RFP

Subsequent information regarding this RFP, including changes made to this document, may be posted under [“What’s New” on the BC Used Oil Management Association website](#). It is the sole responsibility of Proponents to check for any amendments and addenda on the website.

3. Inquiries about the RFP

All inquiries related to this RFP should be directed in writing to the Contact Person identified on the cover page of the RFP by the [deadline for inquiries](#). Proponents must not communicate directly or indirectly with any other employee, contractor or representative of the UOMA regarding the RFP.

4. Proponents’ Meeting

A Proponents’ Meeting will be held at the time and location identified on the cover page of the RFP. All questions received by the [deadline for inquiries](#) will be addressed by the UOMA at the Proponents’ Meeting.

5. Modification of Terms

The UOMA reserves the right to modify the terms of the RFP at any time at its sole discretion. This includes the right to cancel this RFP at any time prior to entering into a Contract with a successful Proponent.

6. Liability for Errors

While the UOMA has used considerable efforts to ensure information in the RFP is accurate, the information is supplied solely as a guideline for Proponents. The information is not guaranteed by UOMA to be accurate, nor is it necessarily comprehensive or exhaustive.

7. Late Proposals

Only complete Proposals received at the Closing Location before the Closing Date will be considered to have been received on time. Late Proposals will not be accepted and will be returned to the Proponent.

8. Eligibility

Proposals will not be evaluated if the Proponent’s current or past corporate or other interests may, in the opinion the UOMA, give rise to a conflict of interest in connection with the project described in this RFP.

9. Proposal Evaluations

Proposals will be assessed based on the evaluation criteria identified in the RFP. Evaluations will be by a committee formed by the UOMA. All personnel will be bound by the same standards of

confidentiality. It is the intent of the UOMA to enter into a Contract with the Proponent with the overall highest-ranking Proposal.

10. Changes to Proposals

By submission of written notice, the Proponent may amend or withdraw its Proposal prior to the Closing Date. Upon closing time, all Proposals become irrevocable. The Proponent will not change the wording of its Proposal after closing and no words or comments will be added to the Proposal unless requested by UOMA for purposes of clarification.

11. Proposal Validity

Proposals will be open for acceptance for at least thirty days after the Closing Date. Proposals that do not comply with the requirements described in this RFP may be rejected in whole or in part or not considered by the UOMA.

12. Currency and Taxes

Prices quoted by Proponents are to be in Canadian dollars and inclusive of Goods and Services Tax.

13. Acceptance of Proposals

This RFP is not an agreement to purchase goods or services. The UOMA is not bound to enter into a Contract with the Proponent who submits the lowest priced Proposal, or with any Proponent.

14. Contract

By submission of a Proposal, the Proponent agrees that should its Proposal be successful, the Proponent will enter into a Contract negotiation with the UOMA.

15. Contract Negotiation

Notice in writing to a Proponent that it has been identified as a successful Proponent and the subsequent full execution of a written Contract will constitute a Contract for the services, and until such time, no Proponent will acquire any legal or equitable rights or privileges relative to the services.

If a written Contract cannot be negotiated within thirty days of notification to a successful Proponent, the UOMA may, at its sole discretion at any time thereafter, terminate negotiations with that Proponent and either negotiate a Contract with the next qualified Proponent or choose to terminate the RFP process and not enter into a Contract with any Proponent.

16. Proponent Expenses

Proponents are solely responsible for their own expenses in preparing a Proposal and for any subsequent negotiations with the UOMA. If the UOMA elects to reject all Proposals, it will not be liable to any Proponent for any claims, whether for costs or damages incurred by the Proponent in preparing the Proposal, loss of anticipated profit in connection with a final Contract, or any other matter.

17. Ownership of Proposals

All Proposals submitted become the property of the UOMA. They will be received and held in confidence by the UOMA.

18. Use of RFP and Information gathered

Any information supplied by the UOMA in relation to this RFP may not be used or disclosed for any purpose other than for the submission of Proposals. By submitting a Proposal, the Proponent agrees to hold in confidence all information supplied by the UOMA in relation to this RFP.

All information gathered on behalf of the UOMA is proprietary to the UOMA. Unauthorized use or distribution of the information is strictly prohibited.

19. Collection and Use of Personal Information

Proponents are solely responsible for familiarizing themselves, and ensuring that they comply, with the laws applicable to the collection and dissemination of information, including resumes and other personal information concerning employees and sub-contractors. Proponents should obtain consent from employees and sub-contractors proposed as resources under the RFP before sharing any of their personal information with the UOMA.

20. Liability

The Proponent will not make a claim against the UOMA for any reason whatsoever or howsoever relating to this RFP and the Proponent hereby waives and releases the UOMA from any demands, liability, claim, costs, expenses, or damages incurred whatsoever or howsoever arising out of or relating to this RFP or any Proposal prepared in response to it.

The UOMA will have no liability whatsoever or howsoever to any Proponent, in connection with this RFP or any Proposal prepared in response to it.