



**sanedi**

South African National Energy  
Development Institute

**REQUEST FOR QUOTATION  
FOR  
APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT CERTIFIED  
ENERGY AUDITOR TRAINING**

NAME OF BIDDER.....

POSTAL ADDRESS .....

STREET ADDRESS .....

CONTACT PERSON .....

TELEPHONE NUMBER Code ..... Number .....

CELL PHONE NUMBER Code ..... Number .....

FACSIMILE NUMBER Code .....Number .....

E-MAIL ADDRESS .....

**Signature of Bidder** ..... **Date** .....

<b>RFQ Number</b>	RFQ2723
<b>Date of RFQ</b>	23 August 2023
<b>SANEDI Contact</b>	<p>All enquiries and RFQ submissions must be directed to :</p> <p>Name: Ms Nondumiso Buthelezi  Tel: 011 038 4369  Enquiries: e-mail address: <a href="mailto:enquiries.procurement@sanedi.org.za">enquiries.procurement@sanedi.org.za</a>  Website address: <a href="http://www.sanedi.org.za">www.sanedi.org.za</a></p>
<b>Closing date &amp; Time Electronic - Submission</b>	<p><b>Wednesday the 06<sup>th</sup> of September 2023 at 11:00am</b></p> <p><b>E-mail submission only: <a href="mailto:quotes.procurement@sanedi.org.za">quotes.procurement@sanedi.org.za</a></b></p>
<b>Work specification (and Technical specifications)</b>	<p><b>1. Project Background</b></p> <p>The South African National Energy Development Institute (SANEDI) in collaboration with the Department of Mineral Resources and Energy (DMRE) continue to professionalize the ESCo market through the registration and certification of Energy Service Companies in South Africa. This assist in increasing the availability of local, sector-specialized technical expertise and increases the clients/consumer confidence in the services being offered. The ESCo Register which is administered and lead by SANEDI is an important tool which facilitates the market development and growth of ESCos in South Africa, and it is accessible to both the public and private sector organizations to identify, plan, develop, finance, or implement energy efficiency projects, including energy efficiency demand side management (EEDSM) and small-scale renewable energy embedded generation .</p> <p>SANEDI's ESCo Market Development programme is facilitating the development and growth of the market through capacity building, skills development and promoting services offered by the ESCos in the National ESCo register. As a result, list of trainings/training plan was developed to facilitate capacity building of South African ESCos.</p> <p><b>2. Project Objectives</b></p> <p>The training program to provide attendees an in-depth and technical review of energy auditing .</p> <p>For Energy Service Companies (ESCOs) to acquire skills of undertaking energy efficiency assessments of commercial and industrial facility's energy systems. Their audits cover building occupancy, operations, maintenance, and code compliance. An auditor aims to provide their client with detailed survey results, risk mitigation analysis, implementation plans, and a final investment-grade analysis.</p> <p>Pre-audit requirements to ensure accurate data collection, measurement, and verification.</p> <p>What you need to know when conducting audits of building equipment and systems, such as lighting, pumps, motors, drives, HVAC, water systems, etc.</p>

How to analyze utilities, and how calculate energy demand baseline, energy rates, energy accounting and performance contracting all affect an energy audit .

**Scope of Works**

**3. SCOPE OF WORKS**

The purpose of this ToR is to: appoint a training provider who will provide the training for energy service companies (ESCOs) in the following area:

- **Certified Energy Auditor**

The training provider should as facilitate the participants registrations where necessary, be involved with training preparations and compile training reports.

**3.1 TRAINING OUTPUTS/DELIVERABLES**

- The appointed service provider should be able to provide a Five (5) days training with an Examination on day Five (5)
- Training for 30 energy professionals
- Training credits (ECSA: 3 CPD credits + 1 CPD credit Exam) (AEE: 4.4 Certification Renewal Credits)
- The provision of soft and hard copies of training manuals.
- Certificates of attendance for each trainee summarizing the training or upskilling outcomes achieved.
- Examination Certification
- SANEDI to provide the venue and catering for the training

**3.2. PROJECT DURATION**

- The appointed training provider must implement the training session in August or September. This includes training preparations, attendance registers and training reports.

**3.3. REPORTING**

- The appointed Training Provider(s) has to submit the training report highlighting achieved deliverables to the SANEDI Project Manager after the completion of the training.
- All resulting reports and data shall be delivered in (i) in electronic format, and (ii) in hard copies. All draft and final reports shall be printed in full colour. The reporting language is English. 7.3. All documents and copyrights excluding copyrighted training content and materials, but including data and databases developed during the process, will remain the intellectual property of SANEDI.
- All drafts and final reports shall be submitted in full to the SANEDI Project Manager, and should be edited, complete and presented in their final versions.

**3.4. COST**

- The Training Provider is requested to provide all costs regarding the work to be undertaken for this training. A summary of the overall proposed charges for the services should be provided. The cost must be VAT inclusive and should be quoted in South African Rand.
- Detailed costing should be aligned with the training scope and deliverables.

**3.5. PAYMENT**

- Payment will be based on the achievement of the deliverables and in line with the approved payment schedule. SANEDI will not make an upfront payment to a successful Service Provider(s).
- Payment will only be made within 30 days in accordance with the delivery of services that will be agreed upon by both parties and upon receipt of an original invoice.

**EVALUATION CRITERIA**

- The evaluation will be carried out in three (2) phases,
- Mandatory criteria, any bid that fails to comply with the following mandatory requirements will be disqualified (Phase 1). **Bids will not be considered if Phase 1 mandatory requirements are not met.**

The table below must be completed by bidder answering yes/no and attach proof.

Mandatory Requirements (Phase 1)	Comply	
	YES	NO
At least 5 years' in delivering professional training successfully in South Africa.		
Evidence that the training provider is locally recognized through the following organization/authority. (Energy Efficiency & Sustainability Experts (AEE) and ASHRAE standard (Standard for Commercial Building Energy Audits).		

**(Phase 2) TECHNICAL EVALUATION**

- Bidders will be technically evaluated based on functionality. The minimum threshold for functionality is **70** out of **100** points .

The technical evaluation criteria for this bid are stated in the table below:

No.	Technical Criteria	Evaluation Criteria	Score Range 1-5	Weightings%
1	<b>Company Experience:</b> Service provider should demonstrate at least 5 years of training experience (CV and Company Profile to be provided)	9 years and more company experience	5	30%
		8 years' but less than 9 years company experience =	4	
		7 years' but less than 8 years company experience	3	
		6 years' but less than 7 years company experience	2	
		5 years' but less than 6 years company experience	1	
2	<b>Training Experience of Key Personnel and Relevant Certification</b> Training experience of two (2) key trainers, stating number of years as training instructors in addition to relevant certifications (CV and certified original copies of certifications) The following certifications would be considered relevant: Certified Energy Manager (CEM) Certified Measurement & Verification Professional (CMVP) Certified Energy Auditor (CEA)	5 years or greater years' of experience with any number of relevant certifications	5	30%
		4 years but less than 5 years' of experience with any number of relevant certifications	4	
		3 years but less than 4 years' of experience with any number of relevant certifications	3	
		More than 1 year but less than 3 years' of experience with any number of relevant certifications	2	
		1 year or less than a year of experience with any number of relevant certifications	1	
3	<b>Reference Letters</b> Reference letters from organisations where collective or group training occurred. (Attach reference letters)	7 letters or more	5	20%
		6 letters	4	
		5 letters	3	
		4 letters	2	
		3 letters or less	1	
4	<b>Training Methodology and Approach</b> Proposed implementation methodology detailing the capacity building plan,	Methodology with description of all outputs/deliverables	5	20%
		Methodology with some outputs/deliverables	4	

	number of facilitators, learning materials and learning objectives. Key focal areas:	Methodology provided with only one output/deliverable	3	
		Methodology provided without the required outputs/deliverable	1-2	
<b>Technical threshold = 70%</b>				
<b>Total = 100%</b>				
Total points available 100 = <b>Minimum threshold 70 points</b>				
<b>Terms and Conditions</b>	The RFQ shall be subjected to the SANEDI procurement terms and conditions which can be found on <a href="http://www.sanedi.org.za">www.sanedi.org.za</a> .  New suppliers are requested to apply for registration as suppliers on the database as no RFQs will be considered without suppliers firstly being registered on the supplier database.			
<b>Quoted Price excluding Disbursements VAT inclusive</b>	(Attach a formal quotation on company official letterhead to this RFQ)			
	R			
<b>Discounted amounts Disbursements VAT inclusive</b>				
	R			
<b>Total Amount VAT inclusive</b>				
	R			
<b>Other Requirements</b>	The supplier must submit the following returnable schedules:  <ol style="list-style-type: none"> <li>1. Pricing schedule</li> <li>2. Attach SBD9, SBD 4 and SBD 6.1</li> <li>3. Attach valid tax clearance</li> <li>4. Certified BBBEE certificate</li> </ol> Forms are available on <a href="http://www.sanedi.org.za">www.sanedi.org.za</a>			

**SBD 4: Bidder’s Declaration of Interest**

	<p>Any legal person, including persons employed by the state, or persons having a kinship with persons employed by the state, including a blood relationship, may make an offer or offers in terms of this invitation to bid (includes an advertised competitive bid, a limited bid, a proposal or written price quotation). In view of possible allegations of favoritism, should the resulting bid, or part thereof, be awarded to persons employed by the state, or to persons connected with or related to them, it is required that the bidder or his/her authorised representative declare his/her position in relation to the evaluating/adjudicating authority where</p> <ul style="list-style-type: none"> <li>- the bidder is employed by the state; and/or</li> <li>- the legal person on whose behalf the bidding document is signed, has a relationship with persons/a person who are/is involved in the evaluation and or adjudication of the bid(s), or where it is known that such a relationship exists between the person or persons for or on whose behalf the declarant acts and persons who are involved with the evaluation and or adjudication of the bid.</li> </ul>
	<p><b>In order to give effect to the above, the following questionnaire must be completed and submitted with the bid.</b></p>

<b>COMPANY &amp; REPRESENTATIVE DETAILS</b>	
Full Name of bidder or his or her representative	
Identity Number	
Position occupied in the Company (director, trustee, shareholder, member):	
Registration number of company, enterprise, close corporation, partnership agreement or trust	
Tax Reference Number	
VAT Registration Number	

<b>DECLARATIONS</b>	<b>YES</b>	<b>NO</b>
Are you or any person connected with the bidder presently employed by the state?		

	<p>If so, furnish the following particulars:</p> <p>Name of person / director / trustee / shareholder/ member</p>		
	<p>Name of state institution at which you or the person connected to the bidder is employed :</p>		
	<p>Position occupied in the state institution</p>		
	<p>Any other particulars:</p>		
	<p>If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?</p>		
	<p>If yes, did you attach proof of such authority to the bid document?</p> <p><u>(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.</u></p>		
	<p>If no, furnish reasons for non-submission of such proof:</p>		
	<p>Did you or your spouse, or any of the company's directors / trustees / shareholders / members or their spouses conduct business with the state in the previous twelve months?</p>		
	<p>If so, furnish particulars:</p>		



	Do you, or any person connected with the bidder, have any relationship (family, friend, other) with a person employed by the state and who may be involved with the evaluation and or adjudication of this bid?		
	If so, furnish particulars:		
	Do you or any of the directors / trustees / shareholders / members of the company have any interest in any other related companies  Wither or not they are bidding for this contract?		
	If so, furnish particulars:		

<b>Full details of directors / trustees / members / shareholders.</b>			
The names of all directors / trustees / shareholders / members, their individual identity numbers, tax reference numbers and, if applicable, employee / PERSAL numbers must be indicated in the table below.			
<b>Full Name</b>	<b>Identity Number</b>	<b>Personal Income Tax Reference Number</b>	<b>State Employee Number / Persal Number</b>


“State” means –

- (a) any national or provincial department, national or provincial public entity or constitutional institution within the meaning of the Public Finance Management Act, 1999 (Act No. 1 of 1999);
- (b) any municipality or municipal entity;
- (c) provincial legislature;
- (d) national Assembly or the national Council of provinces; or
- (e) Parliament.

“Shareholder” means a person who owns shares in the company and is actively involved in the management of the enterprise or business and exercises control over the enterprise.

**DECLARATION OF INTEREST**

I, the undersigned (name).....

Certify that the information furnished in this declaration is correct and I accept that SANEDI may reject the bid or act against me should this declaration prove to be false.

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....

## 1. Preference Points

### PREFERENCE POINTS CLAIM FORM IN TERMS OF THE PREFERENTIAL PROCUREMENT REGULATIONS 2022

**NB: BEFORE COMPLETING THIS FORM, TENDERERS MUST STUDY THE GENERAL CONDITIONS, DEFINITIONS AND DIRECTIVES APPLICABLE IN RESPECT OF THE TENDER AND PREFERENTIAL PROCUREMENT REGULATIONS, 2022**

#### 1. GENERAL CONDITIONS

1.1 The following preference point systems are applicable to invitations to tender: - the 80/20 system for requirements with a Rand value of up to R50 000 000 (all applicable taxes included); and - the 90/10 system for requirements with a Rand value above R50 000 000 (all applicable taxes included).

1.2 Preference Points applicable:

a) The applicable preference point system for this tender is the **80/20** preference point system.

1.3 Points for this tender shall be awarded for:

(a) Price; and

(b) Specific Goals.

1.4 The maximum points for this tender are allocated as follows:

	POINTS
Price	80
Specific Goals	20
<b>Total points for price and specific goals</b>	<b>100</b>

1.5 Failure on the part of a tenderer to submit proof or documentation required in terms of this tender to claim points for specific goals with the tender, will be interpreted to mean that preference points for specific goals are not claimed.

1.6 SANEDI reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the SANEDI.

## 2. DEFINITIONS

- (a) “tender” means a written offer in the form determined by an organ of state in response to an invitation to provide goods or services through price quotations, competitive tendering process or any other method envisaged in legislation;
- (b) “price” means an amount of money tendered for goods or services, and includes all applicable taxes less all unconditional discounts;
- (c) “rand value” means the total estimated value of a contract in Rand, calculated at the time of bid invitation, and includes all applicable taxes;
- (d) “tender for income-generating contracts” means a written offer in the form determined by an organ of state in response to an invitation for the origination of income-generating contracts through any method envisaged in legislation that will result in a legal agreement between the organ of state and a third party that produces revenue for the organ of state, and includes, but is not limited to, leasing and disposal of assets and concession contracts, excluding direct sales and disposal of assets through public auctions; and
- (e) “the Act” means the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000).
- (f) “B-BBEE” means broad-based black economic empowerment as defined in section 1 of the Broad-Based Black Economic Empowerment Act;
- (g) “B-BBEE status level of contributor” means the B-BBEE status of an entity in terms of a code of good practice on black economic empowerment, issued in terms of section 9(1) of the Broad-Based Black Economic Empowerment Act;
- (h) “bid” means a written offer in a prescribed or stipulated form in response to an invitation by an organ of state for the provision of goods or services, through price quotations, advertised competitive bidding processes or proposals;
- (i) “Broad-Based Black Economic Empowerment Act” means the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003);
- (j) “EME” means an Exempted Micro Enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;
- (k) “functionality” means the ability of a tenderer to provide goods or services in accordance with specifications as set out in the tender documents.
- (l) “proof of B-BBEE status level of contributor” means:
  - B-BBEE Status level certificate issued by an authorized body or person;
  - A sworn affidavit as prescribed by the B-BBEE Codes of Good Practice;
  - Any other requirement prescribed in terms of the B-BBEE Act;

- “QSE” means a qualifying small business enterprise in terms of a code of good practice on black economic empowerment issued in terms of section 9 (1) of the Broad-Based Black Economic Empowerment Act;

### 3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

#### 3.1. POINTS AWARDED FOR PRICE

3.1.1 THE 80/20 OR 90/10 PREFERENCE POINT SYSTEMS A maximum of 80 or 90 points is allocated for price on the following basis:

$$P_s = 80 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right) \quad \text{or} \quad P_s = 90 \left( 1 + \frac{P_t - P_{max}}{P_{max}} \right)$$

Where

$P_s$  = Points scored for price of tender under consideration

$P_t$  = Price of tender under consideration

$P_{min}$  = Price of lowest acceptable tender

#### 4. POINTS AWARDED FOR SPECIFIC GOALS

4.1. In terms of Regulation 4(2); 5(2); 6(2) and 7(2) of the Preferential Procurement Regulations, preference points must be awarded for specific goals stated in the tender. For the purposes of this tender the tenderer will be allocated points based on the goals stated in table 1 below as may be supported by proof/ documentation stated in the conditions of this tender:

4.2. In cases where organs of state intend to use Regulation 3(2) of the Regulations, which states that, if it is unclear whether the 80/20 or 90/10 preference point system applies, an organ of state must, in the tender documents, stipulate in the case of—

(a) an invitation for tender for income-generating contracts, that either the 80/20 or 90/10 preference point system will apply and that the highest acceptable tender will be used to determine the applicable preference point system; or

(b) any other invitation for tender, that either the 80/20 or 90/10 preference point system will apply and that the lowest acceptable tender will be used to determine the applicable preference point system, then the organ of state must indicate the points allocated for specific goals for both the 90/10 and 80/20 preference point system.

Table 1: Specific goals for the tender and points claimed are indicated per the table below.

**Note to tenderers: The tenderer must indicate how they claim points for each preference point system.**

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)			Number of points claimed (80/20 system) (To be completed by the tenderer)
	Total points possible	Indicator	Points allocated	
B-BBEE Status level of Contributor	10	Level 1	10	
		Level 2	9	
		Level 3	8	
		Level 4	5	
		Level 5	4	
		Level 6	3	
		Level 7	2	
		Level 8	1	
		Non-compliant	0	
Women	5	Women Owned 76% - 100%	100%	
		Women Owned 51% - 75%	75%	
		Women Owned 26% - 50%	50%	
		Women Owned 5% - 25%	25%	
		Women Owned less than 5% - 0%	0%	
Youth	2.5	Youth Owned 76% - 100%	100%	
		Youth Owned 51% - 75%	75%	
		Youth Owned 26% - 50%	50%	
		Youth Owned 5% - 25%	25%	
		Youth Owned less than 5% - 0%	0%	
Persons with Disability	2.5	Person with Disability 76% - 100%	100%	
		Persons with disability 51% - 75%	75%	
		Persons with disability 26% - 50%	50%	
		Persons with disability 5% - 25%	25%	

		Persons with disability less than 5% - 0%	0%	
<b>TOTAL FOR SPECIFIC GOALS</b>	<b>20</b>			

**DECLARATION WITH REGARD TO COMPANY/FIRM**

4.3 Name of the company/firm.....

4.4 Company registration number:.....

**4.5 TYPE OF COMPANY/FIRM**

Type of Firm	Tick the applicable box here
Partnership/Joint Venture/ Consortium	
One-person business/sole propriety	
Close corporation	
Public Company	
Personal Liability Company	
(Pty) Limited	
Non -Profit Company	
State Owned Company	

4.6. I, the undersigned, who is duly authorised to do so on behalf of the company/firm, certify that the points claimed, based on the specific goals as advised in the tender, qualifies the company/ firm for the preference(s) shown and I acknowledge that:

- i) The information furnished is true and correct;
- ii) The preference points claimed are in accordance with the General Conditions as indicated in paragraph 1 of this form;
- iii) In the event of a contract being awarded as a result of points claimed as shown in paragraphs 1.4 and 4.2, the contractor may be required to furnish documentary proof to the satisfaction of the organ of state that the claims are correct;
- iv) If the specific goals have been claimed or obtained on a fraudulent basis or any of the conditions of contract have not been fulfilled, the organ of state may, in addition to any other remedy it may have –

- (a) disqualify the person from the tendering process;
- (b) recover costs, losses or damages it has incurred or suffered as a result of that person's conduct;
- (c) cancel the contract and claim any damages which it has suffered as a result of having to make less favourable arrangements due to such cancellation;
- (d) recommend that the tenderer or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, be restricted from obtaining business from any organ of state for a period not exceeding 10 years, after the audi alteram partem (hear the other side) rule has been applied; and
- (e) forward the matter for criminal prosecution, if deemed necessary.

.....	
<b>SIGNATURE(S) OF TENDERER(S)</b>	
<b>SURNAME AND NAME:</b>	.....
<b>DATE:</b>	.....
<b>ADDRESS:</b>	.....
	.....
	.....
	.....



### **SBD 9: Certificate of Independent Bid Determination**

I, the undersigned, in submitting the accompanying bid for .....

in response to the invitation for the bid made by SANEDI do hereby make the following statements that I certify to be true and complete in every respect:

I therefore certify, on behalf of ..... that I have read and I understand the contents of this Certificate;

1. I understand that the accompanying bid will be disqualified if this Certificate is found not to be true and complete in every respect;
2. I am authorized by the bidder to sign this Certificate, and to submit the accompanying bid, on behalf of the bidder;
3. Each person whose signature appears on the accompanying bid has been authorized by the bidder to determine the terms of, and to sign the bid, on behalf of the bidder;
4. For the purposes of this Certificate and the accompanying bid, I understand that the word "competitor" shall include any individual or organization, other than the bidder, whether or not affiliated with the bidder, who:

(a) has been requested to submit a bid in response to this bid invitation;

(b) could potentially submit a bid in response to this bid invitation, based on their qualifications, abilities or experience; and

(c) provides the same goods and services as the bidder and/or is in the same line of business as the bidder

5. The bidder has arrived at the accompanying bid independently from, and without consultation, communication, agreement or arrangement with any competitor. However communication between partners in a joint venture or consortium will not be construed as collusive bidding.

6. In particular, without limiting the generality of paragraphs 6 above, there has been no consultation, communication, agreement or arrangement with any competitor regarding:

(a) prices;

(b) geographical area where product or service will be rendered (market allocation)

(c) methods, factors or formulas used to calculate prices;

(d) the intention or decision to submit or not to submit, a bid;

(e) the submission of a bid which does not meet the specifications and conditions of the bid; or

(f) bidding with the intention not to win the bid.

7. In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications and conditions or delivery particulars of the products or services to which this bid invitation relates.
8. The terms of the accompanying bid have not been, and will not be, disclosed by the bidder, directly or indirectly, to any competitor, prior to the date and time of the official bid opening or of the awarding of the contract.
9. I am aware that, in addition and without prejudice to any other remedy provided to combat any restrictive practices related to bids and contracts, bids that are suspicious will be reported to the Competition Commission for investigation and possible imposition of administrative penalties in terms of section 59 of the Competition Act No 89 of 1998 and or may be reported to the National Prosecuting Authority (NPA) for criminal investigation and or may be restricted from conducting business with the public sector for a period not exceeding ten (10) years in terms of the Prevention and Combating of Corrupt Activities Act No 12 of 2004 or any other applicable legislation.

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....