
TERMS OF REFERENCE FOR APPOINTMENT OF A SERVICE PROVIDER TO DETERMINE A BASELINE FOR THE STANDARDS AND LABELLING PROJECT FOR A PERIOD OF 19 WEEKS

1 BACKGROUND

- 1.1 The Energy Efficiency Standards and Labelling (S&L) Project was established to transform the SA market towards the use of more energy efficient household appliances. This will be achieved by purging the market off inefficient appliances and introduce energy efficient appliances over a period of 5 years.
- 1.2 The project also aims to influence consumption patterns by raising awareness of policy makers, manufacturers, distributors, and consumers, via the introduction of efficiency standards and labels into the market.
- 1.3 The success of the project will have a direct impact on the reduction of electricity demand in South Africa and the reduction in carbon emissions associated with the use of household appliances which will be a result of the reduced energy demand.
- 1.4 A total of twelve appliances have been identified for this project, these are:
- Air Conditioners
 - Audio & video equipment
 - Electric water heaters (geysers)
 - Electric lamps
 - Dish washers
 - Washing machines
 - Tumble dryers
 - Washer-dryer combination
 - Fridges
 - Freezers
 - Fridge-freezer combination
 - Electric ovens
- 1.5 Given the nature of the project, which is to influence consumption patterns, it is important that a baseline that will be used as a reference in assessing the success of the project is determined.
- 1.6 Such a baseline will record the sales and efficiencies of all the listed appliances under the S&L project.

1.7 Also important is a monitoring system to track energy efficient products circulating in the SA market. Such a system will be developed separate from the service required in this TOR and will require constant input of data on listed appliances.

2 OBJECTIVES

2.1 One of the key indicators for success of the S&L project will be the increase of the number of energy efficient products in the SA market as a result of the introduction of the new minimum performance standards and labels. It is thus critical that the quantity and level of energy efficiency of products that are currently sold into the SA market is determined as a baseline and reference to measure the impact of the project.

2.2 To this end the sales record on the type and quantity of listed appliances currently in the market, the most recent household energy consumption surveys and the estimated current greenhouse gas emissions attributable to appliances in the market must be determined to inform the project baseline.

2.3 The market assessment or baseline information will be useful when evaluating the success of the S&L project, for strategic planning during project implementation and for improving the implementation of the project on other appliances.

3 SCOPE OF WORK

3.1 The service provider will be under the overall supervision of S&L Project Manager and his/her daily work will be coordinated with the Project Manager.

3.2 The successful service provider will ensure that the expected outputs are completed on time and comply with the specific project criteria and requirements. The scope of work will include the following outputs:

	Output	Verifiable Indicator	Means of Verification
1.	A database of sales, make and energy efficiency classes of	A comprehensive database discussed with	<ul style="list-style-type: none"> ▪ Meetings with stakeholders

	<p>listed products in the SA market</p> <p>This output will include the following data:</p> <ul style="list-style-type: none"> ▪ Market penetration: Sales data from manufacturers and trade associations ▪ Energy efficiency levels of products: Engineering specifications, manufacturer data ▪ Greenhouse Gas emissions factors 	stakeholders	<ul style="list-style-type: none"> ▪ Comments from key stakeholders
2.	Determining potential reduction in energy demand and carbon dioxide emissions based on proposed minimum performance standards	Percentage reduction in energy demand and amount of carbon emissions to be reduced on project completion	<ul style="list-style-type: none"> ▪ Comments on the proposed demand reduction from Eskom and DoE ▪ Comments on projected carbon reduction from DoE and DEA
3.	Populate baseline data onto a monitoring system	Baseline data populated onto the monitoring system to test capability of the system to report on future sales data.	<ul style="list-style-type: none"> ▪ Comments on system output/reports from DoE.
4.	Engage stakeholders on key outputs	Workshop presentation of database, projected reduction in energy demand and amount of carbon emissions to be	<ul style="list-style-type: none"> ▪ Broader stakeholder comments on the baseline

		reduced to stakeholders	
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3.3 Outputs and Schedule:

3.3.1 The project will commence following the signing of a contract between the Department of Energy and the successful service provider.

3.3.2 The project is expected to have duration of no longer than nineteen (19) weeks and the following table provide some guidance in this regard.

Output	Estimated Duration to Complete
A database of sales, make and energy efficiency classes of listed products in the SA market	11 weeks
Determining potential reduction in energy demand and carbon dioxide emissions based on proposed minimum performance standards	2 weeks
Populate baseline data onto a monitoring system	3 weeks
Engage stakeholders on key outputs	3 weeks

4 PAYMENTS

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

5 REPORTING REQUIREMENT AND PROGRESS MEETINGS

5.1 It is envisaged that the Department of Energy will require an initial meeting with the successful service provider to agree on the project process and options to be investigated.

5.2 Progress meeting feedback shall be held as when necessary, but at least twice a month. The venue for these meetings will be in Johannesburg or Pretoria. Representatives from the advisors' organisation shall be obliged to attend. Where applicable, conference calls shall be held to facilitate such meetings.

6 COMPLETION DATE

- 6.1 The duration of the project is nineteen (19) weeks effective from the date a contract is signed with the successful service provider.

7 COMPULSORY INFORMATION SESSION

- 7.1 Briefing session will be held on **11 December 2013 at 10h00**, at the Department of Energy, at 192 Corner Paul Kruger and Visagie Streets at 10H00.

8 TAX CLEARANCE CERTIFICATE

- 8.1 The bidder is required to submit an original and valid Tax Clearance Certificate issued by the South African Revenue Services together with the bid documents before the closing date and time of the bid. Failure to comply with this condition will invalidate the bid

9 Copyright and Intellectual Property

- 9.1 The Department of Energy will become the owner of the information, tools, methodologies, documents, programmes, advice, recommendations and reports collected, furnished and/or compiled by the service provider during the course of, and for the purposes of executing deliverables in this terms of reference.
- 9.2 The copyright and intellectual property of all information, tools, methodologies, documents, programmes, advice, recommendations and reports compiled by the service provider during the course and for the purposes of executing these terms of reference will vest in the Department of Energy.

10 EVALUATION METHODOLOGY

10.1 Cost

- 10.1.1 The service provider will be requested to provide a quote regarding the work to be undertaken for this project.

10.1.2 The total cost must be VAT inclusive and should be quoted in South African currency.

10.2 Broad-Based Black Economic Empowerment

10.2.1 Provisions of the Preferential Procurement Policy Framework Act (PPPFA) of 2011 and its regulation will apply in terms of awarding points.

10.2.2 Bidders are required to submit original and valid B-BBEE Status Level Verification Certificates or certified copies thereof together with their bids, to substantiate their B-BBEE rating claims.

10.2.3 Bidders who do not submit their B-BBEE status level verification certificates or are non-compliant contributors to B-BBEE will not qualify for preference points for B-BBEE.

10.2.4 A trust, consortium or joint venture must submit a consolidated B-BBEE status level verification certificate for every separate bid.

10.2.5 The B-BBEE status level verification certificates submitted must be issued by the following agencies:

10.2.5.1 For bidders who qualify as Exempted Micro Enterprises:

- a) Accounting officers as contemplated in the CCA; or
- b) Verification agencies accredited by SANAS; or
- c) Registered auditors (Registered auditors do not need to meet the prerequisite for IRBA's approval for the purpose of conducting verification and issuing EMEs with B-BBEE Status Level Certificates).

10.2.5.2 For bidders other than EMEs:

- a) Verification agencies accredited by SANAS
- b) Registered auditors approved by IRBA

The table below depicts the B-BBEE status level of contribution:

B-BBEE Status Level of Contributor	Number of points (80/20 system)
1	20
2	18
3	16
4	12
5	8
6	6
7	4
8	2
Non-compliant contributor	0

10.3 Company Experience

10.3.1 The company should at least have the following:

- a) 5 years proven experience in determining baseline or market surveillance.
- b) Expertise in the field of energy efficiency.
- c) Participation in product market surveillance.

10.3.2 The company must include at least 3 contactable references as proof of experience in related projects.

10.4 Team leader and team members' experience

10.4.1 Team Leader must have at least seven (7) years' experience in the baseline determination or related field.

10.4.2 Individual team members must have at least five (5) years' experience working on baseline or market surveillance.

10.4.3 CV's of the team leader and team members must be attached to the technical proposal as proof.

10.5 Qualification

10.5.1 Team leader and team members must at least have the following:

- a) Advanced degree related to energy and energy efficiency.
- b) Qualification in relevant technical area of specialisation pertinent to baseline determination.

10.5.2 Certified copies of qualifications must be attached to the proposal. Failure to attach, bidders will forfeit functionality points in this category.

10.6 Project Plan

10.6.1 The project plan or proposal should, in addition to price, include intermediate and final outputs and identified timeframes/milestones.

10.6.2 Proposed Methodology

10.6.3 Management of the project

10.6.4 The successful service provider may be required to present their Project Execution Plan.

11 EVALUATION CRITERIA

11.1 Bids will be evaluated on **80/20** point system as outlined in the PPPFA of 2011.

11.2 The proposals will be evaluated in phases outlined below:

Phase 1: Bidders will be evaluated based on functionality/technical capability. The minimum threshold for functionality is **70 out of 100 points**. Bidders who fail to meet minimum threshold will be disqualified and will not be evaluated further for price points.

No	Criteria	Weights
1	Company Experience <ul style="list-style-type: none">▪ 5 years proven experience in determining baseline or market surveillance.▪ Expertise in the field of energy efficiency.	20 10 5

	<ul style="list-style-type: none"> ▪ Participation in product market surveillance. 	5
2	<p>Experience of Team leader and team members</p> <ul style="list-style-type: none"> ▪ Team Leader must have at least seven (7) years' experience in the baseline determination or related field. ▪ Individual team members must have at least five (5) years' experience working on baseline or market surveillance. 	20
		10
		10
3.	<p>Qualifications</p> <ul style="list-style-type: none"> ▪ Team leader and team members must at least have the following: <ul style="list-style-type: none"> - Advanced degree related to energy and energy efficiency. - Qualification in relevant technical area of specialisation pertinent to baseline determination. 	20
		10
		10
4	<p>Project Plan</p> <ul style="list-style-type: none"> ▪ Project plan should include intermediate and final outputs and identified timeframes/milestones. ▪ Proposed Methodology. ▪ Management of the project. 	40
		20
		10
		10
Total		100

For purpose of evaluating functionality, the following values will be applicable:

0=	Very Poor	Do not meet the requirements
1=	Poor	Will not be able to fulfil the requirements
2=	Average	Will partially fulfil the requirements
3=	Good	Will be able to fulfil the requirements
4=	Very Good	Will be able to fulfil better in terms of the requirements adequately
5=	Excellent	Will fulfil the requirements exceptionally

Phase 2:

Price	80
B-BBEE compliance	20

12 FORMAT AND SUBMISSION OF THE PROPOSAL

12.1 All the standard bidding documents (SBD) must be completed in all respects by bidders. Failure to comply will invalidate a bid.

12.2 Bidders are requested to submit two (2) copies: 1 original plus copy of the proposal and bid documents.

13 CLOSING DATE

13.1 Proposals must be submitted on or before **08 January 2014 at 11h00**, at Department of Energy, 192 Corner Visagie and Paul Kruger Streets, Pretoria in the bid box marked Department of Energy .**No late bids will be accepted.**

14 ENQUIRIES

14.1 All technical enquiries to be directed in writing to:

Mr Ike Ndlovu/Mr Maphuti Legodi

Tel: 012- 406 7314/ 7645

Email:ike.ndlovu@energy.gov.za/maphuti.legodi@energy.gov.za

14.2 All bid enquiries to be directed to:

Ms Rachel Moerane/Ms Daisy Maraba

Tel: 012- 406 7742/7748

Email: rachel.moerane@energy.gov.za / daisy.maraba@energy.gov.za