

## 1. BACKGROUND

Regulations for the Mandatory Display and Submission of Energy Performance Certificates for Buildings, gazetted on 8 December 2020, require that all relevant buildings have an Energy Performance Certificate displayed. An Energy Performance Certificate (EPC) is defined as a certificate issued by an accredited body in respect of a building in accordance with the South African National Standard *SANS 1544: 2014 Energy Performance Certificates for buildings* that indicates the energy performance of that building.

The issuing of the Energy Performance Certificates for buildings requires accurate and reliable building energy consumption and activity data that will also be included in the National Building Energy Performance Register (NBEPR) developed by the South African National Energy Development Institute, (SANEDI). The energy performance of a building is measured in terms of kilowatt-hours per square meter, per annum (kWh/m<sup>2</sup> /pa) of net floor area in accordance with SANS 1544:2014 for energy performance of buildings.

The regulations apply to non-residential buildings with a net floor area of at least 1,000 m<sup>2</sup> for government owned buildings, operated or occupied by an organ of the state, which have not been subject to a major renovation within the past two years of operation. These buildings must have a dominant occupancy classification in terms of Regulation A20 of the National Building Regulations as A1, A2, A3, or G1.

The building energy performance is graded from **A** to **G**, with A being the most energy efficient and G the least efficient. Buildings are expected to achieve at least a D-rating in order to be compliant with the national building regulations and must clearly display their EPC at the building entrance of the facility.

The Hessequa Municipality is therefore seeking to appoint a service provider, who is accredited as an EPC Inspection Body (IB) with the South African National Accreditation System (SANAS) for Energy Performance Certificates for Buildings. The appointed service provider will be required to complete energy performance certificate assessment(s) according to SANS 1544 for all relevant buildings owned by the Hessequa Municipality to determine the building's rating.

The service provider is expected to complete and submit the following reports to the municipality, together with an Inception Report, an Assessment Report that captures the methodology, assumptions, and calculations used for each EPC, and a Close Out report.

## 2. SPECIFICATION

The regulations require that the EPC and related data be submitted to SANEDI should be mainly from the four building classes indicated in the table below, and the SANAS-accredited Inspection Body must sign and issue the EPC on behalf of the building owner in line with the SANS 1544:2014.

<b>Building Occupancy Class</b>	<b>Occupancy</b>	<b>Description</b>
<b>A1</b>	<b>Entertainment and public assembly</b>	Occupancy where persons gather to eat, drink, dance or participate in other recreation.
<b>A2</b>	<b>Theatrical and indoor sport</b>	Occupancy where persons gather for the viewing of theatrical, operatic, orchestral, choral, cinematographic or sport performances.
<b>A3</b>	<b>Places of instruction</b>	Occupancy where school children, students or other persons assemble for the purpose of tuition or learning.
<b>G1</b>	<b>Offices</b>	Occupancy comprising offices, banks, consulting rooms and other similar usage.

The Hessequa Municipality will provide the following list of data to the successful service provider for each building as far as possible:

- Building Name
- Building Plans, where available
- Physical Address
- Owner of the building
- Occupancy class or classes
- Copy of latest approved building plans
- Copy of sub metered energy readings for the selected 12-month period, if available
- Copy of electricity bills for the selected 12-month period
- Cadastral Information – erf number
- Where available, the following information will be provided: area schedule, year of construction, occupancy certificate, year of last major renovation

***It should be assumed by the service provider that there is no readily available building data from the municipality and this data will need to be determined by visiting each building site for.***

- Estimated Net Floor Area – where a mixed use building, the net floor area for each use type
- Estimated Gross Floor Area
- Number of Floors

***In addition, it should be assumed that there is no readily available energy data and the following energy data will need to be gathered:***

- Electricity consumption for 2022 calendar year in kWh
- Consumption of liquid or gas fuels for 2022 calendar year in kWh
- Where relevant, the onsite energy production, use and export from any installed photovoltaic systems in kWh
- Calibration certificates for all meters in metered buildings
- Electricity bills for all buildings without smart meters

The Hessequa Municipality will provide as part of the tender documentation, a list of the buildings including their location that are to be included in this tender.

### 3. SCOPE OF WORKS AND OUTPUTS

The scope of works required is:

Specifications	Comply Yes/No	Page to reference
<p>3.1 <u>Inception Report</u>, with completed work plan activities with agreed milestones and due dates, including detailed project approach and methodology. The Inception Report is to be submitted to the Project Manager within two weeks of the Inception Meeting and is to include the following:</p> <ul style="list-style-type: none"> <li>• Determination of data requirements for the issuing of Energy Performance Certificates for government buildings, in line with the promulgated regulations and SANS 1544:2014 and building classifications.</li> <li>• Develop and provide data collection questionnaires and protocols that will be used to collect data for the issuing of EPCs</li> <li>• Verification and quality assurance of data collected.</li> </ul>		
<p>3.2 Provide an <u>Energy Performance Certificate (EPC)</u> for each <u>building</u> that is in accordance with the South African National Standard SANS 1544: 2014 <i>Energy performance certificates for buildings</i> and the Regulations for the Mandatory Display and Submission of Energy Performance Certificates for Buildings.</p> <ul style="list-style-type: none"> <li>• The service provider will be required to obtain a correct certificate number for each EPC from South African National Energy Development Institute (SANEDI).</li> <li>• For each building, the certificate must be provided as a digital version in PDF format, in the EPC template prescribed by the regulation.</li> <li>• Where any Energy Performance Certificate is not accepted by SANEDI, the service provider will be required to update that report until it is compliant and accepted by SANEDI.</li> <li>• The list of buildings provided by the Hessequa Municipality will indicate those buildings where plans are available. Where a building plan is not available, the service provider will be required to do an on-site area calculation.</li> <li>• Draft and final versions of each EPC will be reviewed by the Hessequa Municipality Project Manager prior to acceptance of completion.</li> </ul>		
<p>3.3 Provide an <u>Assessment Report</u> that captures the methodology, assumptions, verification and quality assurance of data collected, and calculations used to complete all EPCs.</p> <ul style="list-style-type: none"> <li>• Each batch of up to 10 completed EPCs is to be accompanied by a draft assessment report, within a week of their completion.</li> <li>• The Assessment Report must be provided as a digital version in MS Word and PDF.</li> <li>• Draft and final versions of the Assessment Report will be reviewed by the Hessequa Municipality Project Manager prior to acceptance of completion.</li> </ul>		
<p>3.4 Provide a <u>Close-out Report</u> capturing an overview of the work completed including the lessons learnt and recommendations for future EPC processes.</p> <ul style="list-style-type: none"> <li>• The close-out report must be provided as a digital version in PDF.</li> <li>• Draft and final versions of the close-out report will be reviewed by the Hessequa Municipality Project Manager prior to acceptance of completion.</li> </ul>		
<p>3.5 <u>Meetings</u> It is expected that the service provider will prepare for and attend the following meetings:</p> <ul style="list-style-type: none"> <li>• 1 x virtual inception meeting within a week of signing the contract.</li> <li>• Building site visits, to the list of buildings provided by the Hessequa Municipality</li> </ul>		

<p>as and when required and in compliance with Covid-19 Regulations from National Government and the Hessequa Municipality.</p> <ul style="list-style-type: none"> <li>• Monthly virtual progress meetings.</li> <li>• Present at up to two interdepartmental meetings, as and when requested by the Hessequa Municipality.</li> <li>• 1 x virtual Close-out meeting within the final week of the contract.</li> </ul>		
<b>4 ADDITIONAL INFORMATION</b>		
<p>4.1 The following additional information is provided:</p> <ul style="list-style-type: none"> <li>• It is anticipated that the appointed service provider will be required to visit buildings for primary data collection and verification of any data provided.</li> </ul>		
<p>4.2 Notes on data collection and verification:</p> <ul style="list-style-type: none"> <li>• To complete the EPCs, the service provider will be required to calculate the energy used outside of the net floor area, as the buildings are not sub-metered, to separate these areas out from the reported energy consumption.</li> <li>• All photovoltaic systems, if any, are required to have an on-site check to verify meter data</li> </ul>		
<p>4.3 Notes on timeframe:</p> <ul style="list-style-type: none"> <li>• It is required that all EPCs must be completed and displayed by 7 December 2025 in order to ensure compliance with the EPC regulations.</li> <li>• For this to be achieved, all EPCs are to be completed by 30 June 2024, with the final Assessment Report and Close Out report only required after this date.</li> <li>• Where there may be an opportunity to extend this timeframe, for example if any changes are made by the Minister of the Department of Mineral Resources and Energy (DMRE), this will be discussed and agreed to by both the Hessequa Municipality and the service provider.</li> </ul>		

#### **5 DURATION OF PROJECT**

The duration of the project will be 12 months from the date of award of this tender.

#### **6 PAYMENT**

Payment will be based on the achievement of the deliverables and in line with the approved payment schedule. Hessequa Municipality will not make an upfront payment to a successful Service Provider.

Payment will only be made within 30 days in accordance to the delivery of services that will be agreed upon by both parties and upon receipt of an original invoice.

#### **7 INFORMATION TO BE PROVIDED WITH TENDER**

The following information shall be provided with the Tender in order to evaluate functionality, as described under part C3.3 below:

7.1 Work Programme/Schedule: A written report must be provided wherein bidders should propose the main activities for the implementation of this project indicating: Clear timelines (start-end dates), critical path activities demonstrating that the project can be completed within the stated period.

7.2 Project methodology: A written report must be provided wherein bidders are to indicate the approach (methodology and technical approach) detailing the execution of the project which is consistent with the work programme/schedule. The methodology is to make reference to the scope of works. This must also include

contingency planning and management. The key risk factors affecting the project should be described with possible mitigation action.

7.3 Experience of Professionals: A CV is to be provided for each key project team member with a table (Schedule 1A) indicating the number of years of relevant work experience in Building Energy Performance Certificates, Building Energy Audits and/or Building Energy Management & Verification Services, all relevant qualifications and training, and a sample projects relevant to this experience and their role. It is possible for one person to perform more than one of the three key roles of technical manager, quality manager and inspector/energy performance assessor

7.4 Past projects of the company: A table (Schedule 1B) of past projects by the company of a similar nature from within the last 15 years, such as Energy Performance Certificates, Energy Building Audits or Energy Measurement and Verification, including for each project the start and end date, the location, the name and contact details of the client, a short description of the work undertaken and the rand value of the project.

7.5 Accreditation Certificate indicating service provider is an accredited body for Energy Performance Certificate for Buildings and a completed table (Schedule 1C) with the name of the company, name of accreditation body and the accreditation number.

7.6 Company registration certificate and a company profile.

**7.7 Schedule 1 A**

Name of Team Member	Role in Project Team	Qualification(s)	Relevant Training	Number of years of relevant experience

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**7.8 Schedule 1 B**

<b>Name of Project</b>	<b>Project Duration (start and end date)</b>	<b>Value</b>	<b>Location</b>	<b>Client Details</b>	<b>Short Description</b>

**7.9 Schedule 1 C**

Company Name	Name of Accreditation Body	Accreditation Number	Date of Issue	Date of Expiry

**Failure to provide the information as stated above, may result in your tender being declared non-responsive.**

DECLARATION,

I, THE UNDERSIGNED (NAME).....  
 CERTIFY THAT THE INFORMATION FURNISHED ABOVE IS CORRECT. I ACCEPT THAT THE MUNICIPALITY MAY ACT AGAINST ME SHOULD THIS DECLARATION PROVE TO BE FALSE.

AUTHORISED SIGNATURE: .....

NAME: .....

CAPACITY: .....DATE: .....