

REQUEST FOR PROPOSAL (RFP)  
FOR  
CONDUCT OF REFRESHER COURSE FOR ENERGY AUDITOR & ENERGY MANAGER



**Bureau of Energy Efficiency**  
**4<sup>th</sup> Floor, Sewa Bhawan,**  
**R. K. Puram**  
**New Delhi – 110066**

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**TABLE OF CONTENTS**

<b>1.0</b>	<b>LETTER OF INVITATION (LOI).....</b>	<b>4</b>
<b>2.0</b>	<b>INSTRUCTION TO AGENCIES / FIRMS.....</b>	<b>5</b>
2.1	Background Information.....	5
2.1.1	About BEE.....	5
2.1.2	About “About National Certification Examination for Energy Managers and Energy Auditors” Programme.....	6
2.2	Critical Information.....	7
2.3	Proposals.....	8
2.3.1	Cost of Proposal.....	9
2.3.2	Contents of the Proposal.....	9
2.3.3	Authorized Signatory (Agencies / Firms) .....	10
2.3.4	Conditions for Consortium / Outsourcing.....	10
2.3.5	Contact details of the Agencies / Firms.....	10
2.3.6	Documents Comprising the Bid.....	10
2.3.7	Power of Attorney.....	11
2.4	Bid Processing Fees, Bid Security and Performance Security.....	11
2.4.1	Bid Security.....	11
2.4.2	Bid Processing Fees.....	11
2.4.3	Performance Security.....	11
2.5	Conflict of Interest.....	12
2.6	Language of Bids.....	12
2.7	Confidentiality.....	12
2.8	Disclaimer.....	12
2.9	Amendment of RFP.....	12
2.10	Force Majeure.....	13
2.11	Termination of the Bid.....	13
2.12	Liquidated damage.....	13
2.13	Termination of Contract.....	13
<b>3.0</b>	<b>TERMS OF REFERENCE (TOR).....</b>	<b>14</b>
3.1	Objective of the assignment:.....	14
3.2	Detailed Scope of Work: .....	14
<b>4.0</b>	<b>TIMELINE.....</b>	<b>15</b>
<b>5.0</b>	<b>TERMS OF PAYMENT.....</b>	<b>15</b>
<b>6.0</b>	<b>Qualification / Experience and Eligibility of the Firm.....</b>	<b>16</b>
6.1	Eligibility criteria for the Firm/Company/Agency.....	16
6.2	Qualification and Experience of the Firm/Agency.....	16
<b>7.0</b>	<b>CRITERIA OF BID EVALUATION AND SELECTION PROCEDURE.....</b>	<b>17</b>
7.1	Consideration of responsiveness.....	17
7.2	Preliminary Scrutiny.....	18
7.3	Evaluation of Quality.....	19

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7.4	Evaluation under Quality and Cost Based Selection (QCBS).....	21
7.5	Selection of Agency	22
<b>8.0</b>	<b>RFP FORMS</b> .....	22
8.1	RFP Form 1: Letter of Proposal Submission.....	23
8.2	Correspondence Details.....	23
8.3	Document forming part of Proposal.....	24
8.4	RFP Form 2: Eligibility and Other Details.....	26
8.5	RFP Form 3: Prior Experience.....	26
8.6	RFP Form 4: Approach, Methodology and proposed Work Plan including the timelines.....	27
8.7	RFP Form 5: Resumes of the members in the proposed team.....	28
9.8	RFP Form 6: Declaration Letter.....	28
<b>Annexure –1</b>	.....	29

## **1.0 LETTER OF INVITATION (LOI)**

This Request for Proposal (RFP) is for hiring of an agency/firm for CONDUCT OF REFRESHER COURSE FOR ENERGY AUDITOR & ENERGY MANAGER

Interested bidders may either download the RFP document from the BEE website ([www.beeindia.gov.in](http://www.beeindia.gov.in)) or may obtain the same from BEE, 4th Floor, Sewa Bhavan, R.K. Puram, New Delhi - 110066 on payment of Rs. 1,000/- (Rupees one thousand only), from the date of release of advertisement. The payment will be accepted in the form of crossed demand draft drawn on any scheduled bank, payable at par in New Delhi in favour of "Bureau of Energy Efficiency, New Delhi". In case of downloading the RFP document, the fee may be remitted along with the bid and also intimation in writing must be sent to this effect to below mentioned email address. If such intimation is not received, the bid may be treated as unresponsive.

Last Date for Submission of RFP: 21 days from the date of this advertisement.

In case of any clarifications, agencies/firms may contact:

Ms. Rajini Thomson  
Coordinator (Exam)  
Bureau of Energy Efficiency,  
Tel : (+91)-11-2617-9699,  
Fax: (+91)-11-2617-8352,  
Email: [thomsonrajini@yahoo.com](mailto:thomsonrajini@yahoo.com)

## **2.0 INSTRUCTIONS TO AGENCIES/FIRMS**

### **2.1 Background Information**

Bureau of Energy Efficiency issues certificates to qualified Energy Auditors and Energy Managers. But under regulation 8 of The Bureau of Energy Efficiency (Certification Procedures for Energy Managers), 2010, these certificates have to be renewed after every five years, by attending a refresher training course.

#### **2.1.1 About BEE**

The mission of BEE is to develop policy and strategies with a thrust on self-regulation and market principles, within the overall framework of the EC Act, 2001 with the primary objective of reducing energy intensity of the Indian economy. This will be achieved with active participation of all stakeholders, resulting in accelerated and sustained adoption of energy efficiency in all sectors.

The setting up of BEE provides a legal framework for energy efficiency initiatives in the country. The Act empowers the Central Government and in some instances the State Governments to:

- Notify energy intensive industries, other establishments, and commercial buildings as designated consumers.
- Establish and prescribe energy consumption norms and standards for designated consumers.
- Direct designated consumers to designate or appoint certified energy manager in charge of activities for efficient use of energy and its conservation.
- Get an energy audit conducted by an accredited energy auditor in the specified manner and intervals of time.
- Furnish information with regard to energy consumed and action taken on the recommendation of the accredited energy auditor to the designated agency.
- Comply with energy consumption norms and standards, and if not so, to prepare and implement schemes for efficient use of energy and its conservation.
- Prescribe energy conservation building codes for efficient use of energy and its conservation in commercial buildings State Governments to amend the energy conservation building codes to suit regional and local climatic conditions.
- Direct owners or occupiers of commercial buildings to comply with the provisions of energy conservation building codes.
- Direct mandatory display of label on notified equipment and appliances.
- Specify energy consumption standards for notified equipment and appliance.
- Prohibit manufacture, sale, purchase and import of notified equipment and appliances not conforming to standards.

### **2.1.2 About National Certification Examination for Energy Managers and Energy Auditors**

The Government of India has enforced The Energy Conservation Act, 2001 (No 52 of 2001, 29th September 2001) with effect from 1st March 2002. The Act provides mainly for efficient use of energy and its conservation and for matters connected therewith or incidental thereto. As per the Energy Conservation Act 2001, it is mandatory for all the designated energy consumers to get energy audit conducted by an Accredited Energy Auditor and to designate or appoint an Energy Manager. BEE has retained the National Productivity Council (NPC) as the National Certifying Agency, which would conduct the National Level Certification Examination for Energy Managers & Energy Auditors under the aegis of Bureau.

#### Need for National Level Certification Examination

The essential qualification for a Certified Energy Manager and Certified Energy Auditor would be the passing of a National Level Certification Examination, which will be conducted under the aegis of Bureau of Energy Efficiency. The national level certification examination, conducted by a National Certifying Agency, will establish a uniform criterion for the certification of Energy Managers/Energy Auditors and will also ensure that services of qualified persons, having the requisite knowledge on the subject, are available to the industry. The certification examination will be conducted based on the syllabus/curriculum approved by the Bureau. The proposed syllabus will go under modifications from time to time based on the feedback received and future developments. The requisite modifications will be incorporated by the national level certification agency in the syllabus in consultation with the Bureau from time to time.

#### Energy Auditor

Energy Auditor is one who has passed all the four papers (Energy Efficiency in Electrical Utilities, General Aspects of Energy Management & Energy Audit, Energy Efficiency in Thermal Utilities, Energy Performance Assistance for Equipment and Utility Systems) of the National Level Certification Examination conducted by Bureau of Energy Efficiency (BEE).

Energy Manager

Certified Energy Manager is one who has passed three papers (Energy Efficiency in Electrical Utilities, General Aspects of Energy Management & Energy Audit, and Energy Efficiency in Thermal Utilities) of the National Level Certification Examination conducted by Bureau of Energy Efficiency (BEE).

Validity of Certification

The Certification made under Regulation 8 of The Bureau of Energy Efficiency (Certification Procedures for Energy Managers), 2010 shall be valid for a period of five years (from date of issuance) and renewable subject to attending the Refresher Course once in every five years.

**2.2 Critical Information**

Last date for acceptance of queries	16 <sup>th</sup> May 2018
Date for pre-bid meeting	18 <sup>th</sup> May 2018 (11:30 AM)
Last date for receipt of RFP	25 <sup>th</sup> May 2018
Validity of the RfP	12 Months (extendable to 6 months)
Place, time and date of opening of financial proposals	To be informed later <b>(only to technically qualified bidders)</b>
Contact Person for queries	Ms. Rajini Thomson Coordinator(Exam) 4 <sup>th</sup> Floor, Sewa Bhawan, R. K. Puram, New Delhi-110066, India Tel:(+91)-112617-9699, Fax: (+91)-1126178352 <b>Email: <a href="mailto:thomsonrajini@yahoo.com">thomsonrajini@yahoo.com</a></b>
Contact Person for Submission of RFP	Secretary Bureau of Energy Efficiency 4 <sup>th</sup> Floor, Sewa Bhawan, R. K. Puram, New Delhi-110066, India Tel:(+91) 112617-9699, Fax: (+91)-1126178352

Note: BEE will use Email as a primary mode of communication and will upload all relevant information on BEE's website (<http://www.beeindia.gov.in>).

### 2.3 Proposals

The quotation should be in two parts: Part A – Technical; Part B – Financial, on A-4 sized pages (Font – Times New Roman; Font Size 11 with margins set at least 2.5 cm all round); should include the following:

The technical proposal as per requirement of the pre-qualification criterion spelt under section 6.0 is to be submitted in a separate envelope titled **“Technical Proposal for hiring of an agency/firm for CONDUCT OF REFRESHER COURSE FOR ENERGY AUDITOR & ENERGY MANAGER”** and named **ENVELOP ‘A’**.

#### **Part A: Technical:**

- Background information that includes an interpretation and understanding of the terms of reference;
- Methodology and approach outlining a clear conceptual and analytical framework for the activities;
- Proposed work plan outlining clear timeframe and logical steps in conducting the assignment;
- Profile of the consultants/team members and detailed CV;
- Name and brief background of the consultants, including existing experience and expertise that will be of benefit to the proposed assignment;
- Names and contact information of referees for the three most recent and relevant projects.

#### **Part B: Financial:**

- The financial proposal is to be submitted in a separate sealed envelope titled **“Financial Proposal for Hiring of CONDUCT OF REFRESHER COURSE FOR ENERGY AUDITOR & ENERGY MANAGER”** and named **ENVELOP ‘B’**.
- Agencies /firms shall submit two quotations clearly indicating the Cost of services for 12 months in both figure and words, in INR.
- In the event of any difference between figures and words in quotation, the amount indicated in words will be taken in account. In the event of difference between the arithmetic total and the total shown in the financial proposal, the lower of the two shall be taken into account.
- All the cost associated with the assignment shall be included in the financial proposal.
- These shall normally cover remuneration for all the team members and experts, cost of training center, Lunch, snacks (2 time in a day) for the participants and other administrative cost related to refresher course etc. The boarding, lodging and



travelling cost of the experts (max. 3 Nos.) and BEE officials (Max. 2 no.) would be borne by the agency. The total amount indicated in the financial proposal shall be without any condition attached or subjected to any assumption and shall be final and binding. In case any assumption or condition is indicated in the financial proposal, it shall be considered non-responsive and liable to be rejected.

- The necessary items containing bag, letter pad, pen, pencil, are to be provided by the agency to the participants.
- The financial proposal shall take into account all expenses and tax liabilities including GST. Further all payment shall be subjected to deduction of taxes at source as per applicable laws.
- The Financial offer in respect of the above assignment must be valid for entire contract period from the date of opening of the financial offer. Bidders should express the price of their services in Indian currency only. **Format for financial proposal is enclosed as Annexure-1.**
- ENVELOPE-B will be opened only for bidders who have been found successful after evaluation in terms of the outlined criteria, meeting a minimum technical score on the information furnished in ENVELOPE-A.

#### Other Important Terms & Conditions:

Agent can apply for all the groups as per their choice as mention below in the table X.

The work shall be carried out as per the finalized time schedule and requirements of BEE, providing fortnightly updates (in writing).

#### **2.3.1 Cost of Proposal**

The agency / firm shall bear all costs associated with the preparation and submission of its bidding document, including cost of presentation for the purposes of clarification of the bid, if so desired by the purchaser. BEE will in no case be responsible or liable for those costs, regardless of the conduct or outcome of the qualifying process. BEE reserves the right to cancel the RFP and is not liable for any outcome due to the action taken.

#### **2.3.2 Contents of the Proposal**

The agency / firm is expected to examine all instructions, forms, terms & conditions and Statement of Work in the RFP document. Failure to furnish all information required for submission of the bids not substantially responsive to the RFP in every respect will be at the agency's / firm's risk and may result in the rejection of the bid.

### **2.3.3 Authorized Signatory (Agencies / Firms)**

- The "Authorized Signatory" as used in the bid shall mean the one who has signed the RFP document forms.
- The authorized signatory should be the duly Authorized Representative of the agencies / firms, for which a certificate of authority will be submitted. All certificates and documents (including any clarifications sought and any subsequent correspondences) received hereby, shall, as far as possible, be furnished and signed by the authorized signatory. The power of authorization or any other document consisting of adequate proof of the ability of the signatory to bind the agency / firm shall be annexed to the bid. BEE may reject outright any proposal not supported by adequate proof of the signatory's authority.

### **2.3.4 Conditions for Consortium / Outsourcing**

The agencies / firms may have the option to submit the proposal with other consortium partners.

Organization may involve one or more agencies as partner only for meeting work experience and MoU for such must be submitted. However, the bidder can't change the consortium partner during the course of the study. Non-submission of agreement documents of the consortium partners will lead to disqualification. Consortium partners cannot bid separately for the study if applied by their consortium. In case of any such discrepancy found, bid for the both consortium and firms will be rejected. Selected agency/firm cannot outsource their work to any third party at any point of time. The consortium partner should not be involved in any major litigation that may have an impact of affecting or compromising the delivery of services as required under this contract. The consortium partner should not have been black-listed by any Central / State Government or Public-Sector Undertakings. If at any stage of qualifying process or during the course of the Contract, any suppression / falsification of such information is brought to the knowledge, BEE shall have the right to reject the proposal or terminate the contract, as the case may be, without any compensation to the consortium of agency / firm. **BEE shall only deal with the lead agency for all the purposes and work order shall be placed in the name of lead agency.**

### **2.3.5 Contact details of the Agencies / firms**

The agencies / firms who want to receive BEE response to queries should give their contact details to BEE. The agencies / firms should send their contact details in writing at the BEE contact address indicated under section 2.2.

### **2.3.6 Documents Comprising the Bid**

The proposal prepared by the agencies / firms shall comprise the following components:

- Correspondence Details.

- Write up on approach / methodology and work plan
- Documentary proof to be provided against each criteria mentioned at 6.1 & 6.2
- Bid Processing Fees of INR 5,000/- (Five Thousand Only)
- Bid Application Fee of INR 1,000/- (One Thousand only)
- Bid Security of INR 2,00,000/- (INR Two Lakh Only)
- Technical Proposal, as per qualification criterion provided in the RFP.
- Financial Proposal.

### **2.3.7 Power of Attorney**

Registered Power of Attorney executed by the agencies / firms in favor of the Principal Officer or the duly Authorized Representative, certifying him/her as an authorized signatory for the purpose of this RFP. BEE shall not be responsible for non-receipt / non-delivery of the Bid due to any reason whatsoever. The agencies / firms are advised to study the RFP document carefully. Submission of Bid shall be deemed to have been done after careful study and examination of the RFP document with full understanding of its implications.

## **2.4 Bid Processing Fees, Bid Security and Performance Security**

### **2.4.1 Bid Security**

- The agency/firm shall furnish, as a part of its proposal, a Bid Security of **Rs. 2,00,000 (INR Two Lakhs Only)** in the form of demand draft issued by any Nationalized/ scheduled bank, in favor of “Bureau of Energy Efficiency” payable at New Delhi, returnable after completion of the whole assignment for selected agencies.
- Any bid not accompanied with the bid security will be rejected by BEE. BEE shall not be liable to pay any interest on the bid security and the same shall be interest free. The bid security is to remain valid for a period of one year.
- Bid securities of the unsuccessful bidders should be returned to them latest on or before the 30<sup>th</sup> day after the award of the contract.

### **2.4.2 Bid Processing Fees**

The agencies / firms should submit a non-refundable bid processing fee of **Rs. 5, 000/- (INR Five Thousand Only)** at time of submission of the technical and financial proposal to BEE. The payment will be accepted in the form of crossed demand draft on any scheduled bank, in favour of “Bureau of Energy Efficiency” payable at New Delhi.

### **2.4.3 Performance Security**

Within **fifteen (15) days** of the receipt of notification of award from BEE, the successful agency/firm shall furnish the Performance Security in the form of Bank Guarantee. The value of Performance Security would be 10% of the total contract value. The Performance

Security would be valid till the completion of the assignment or any such extended period as decided by BEE.

## **2.5 Conflict of Interest**

The agencies / firms who are selected for the work will have to maintain the confidentiality of the information compiled. In no case the agencies / firms would be allowed to use the data or share the information with anyone else, except for the BEE. BEE shall hold the copyrights over any of the data collected or compiled during the course of the awards.

## **2.6 Language of Bids**

The bids prepared by the agencies / firms and all correspondence and documents relating to the bids exchanged by the agencies / firms and the Purchaser, shall be written in the English language, provided that any printed literature furnished by the agencies / firms may be written in another language so long the same is accompanied by an English translation in which case, for purposes of interpretation of the bid, the English translation shall govern.

## **2.7 Confidentiality**

BEE require that recipients of this document to maintain its contents in the same confidence as their own confidential information and refrain from any public disclosure whatsoever.

## **2.8 Disclaimer**

BEE and/or its officers, employees disclaim all liability from any loss or damage, whether foreseeable or not, suffered by any person acting on or refraining from acting because of any information including statements, information, forecasts, estimates or projections contained in this document or conduct ancillary to it whether or not the loss or damage arises in connection with any omission, negligence, default, lack of care or misrepresentation on the part of BEE and/or any of its officers, employees.

## **2.9 Amendment of RFP**

At any time prior to the last date for receipt of bids, BEE, may, for any reason, whether at its own initiative or in response to a clarification requested by a prospective agencies / firms, modify the RFP document by an amendment. In order to provide prospective agencies / firms reasonable time in which to take the amendment into account in preparing their bids, BEE may, at their discretion, extend the last date for the receipt of bids and/or make other changes in the requirements set out in the RFP.

**2.10 Force Majeure**

Shall mean and be limited to the following: -

- War/hostilities
- Riot or Civil commotion
- Earthquake, flood, tempest, lightening or other natural physical disaster.
- Restrictions imposed by the Government or other statutory bodies which prevents or delays the execution of the Contract by Consultant.
- In the event of any force majeure cause, agency or the BEE shall not be liable for delays in performing their obligations under this order and the completion dates may be extended, for a period not exceeding the period of delay attributable to the causes of Force Majeure. Neither BEE nor agency shall be liable to pay extra costs provided it is mutually established that Force Majeure Conditions did actually exist.

The agency shall at all times, Indemnify and keep indemnified, the BEE and its officer's servants and agents, from and against all/any claims whatsoever, arising as a consequence of, or in the course of execution of the work (including but not limited to property loss and damage, personal accident, injury or death of or to property or person, of the agency or any JV partner or sub-contractor, and / or the servants or agents of the consultant, or any other JV partner or any sub-contractor and / or of the BEE).

**2.11 Termination of the Bid**

BEE shall have the right to reject this bidding process any time before issuing letter of award to the selected agency for conduct of refresher course for Energy Managers and Energy Auditors.

**2.12 Liquidated damage**

Delay at any stage in execution of the contract due to reasons solely attributed to successful agency/firm beyond the time schedule as agreed or any extension thereof granted by the BEE shall attract Liquidated Damages at the rate of 1 % of the total contract value per week of delay subject to maximum of 10 % of the total contract value.

**2.13 Termination of Contract**

BEE shall have the right to terminate the contract of the agency at any time during the tenure of the work, if the performance of the agency is found to be unsatisfactory or violation of any clause of the RFP pertaining to execution of the work. For termination of the contract, BEE shall provide the agency a notice of minimum of 15 days, to allow the agency to clarify its position of unsatisfactory performance observed by BEE. If the clarification provided by the agency is not up to the satisfaction of the competent authority of BEE, the contract of the agency will be terminated.

### 3.0 TERMS OF REFERENCE (TOR)

#### 3.1 Objective of the assignment:

The objective of this assignment is to conduct refresher course for Energy Managers and Energy Auditors. Approx. 9,291 candidates are to be given Refresher Course, by 310 (Approx.) workshops all over India, within 12 months from the date of award of work. The training will be for two days (non-residential). After the training, on the second day the candidates will be assessed through a test. Certificates will be renewed only for the qualified candidates.

Details of candidates registered as EMs & EAs from different zones: -

Table X -- Group wise total no. of Energy Managers & Energy Auditors														
S.No.	Groups													
	G - A		G - B		G - C		G - D		G - E		G - F		G - G	
1	Andaman & Nicobar	3	Karnataka	356	Dadra & Nagar Haveli	2	Chandigarh	40	Bihar	53	Rajasthan	403	Madhya Pradesh	470
2	Andhra Pradesh	659	Kerala	286	Maharashtra	2091	Haryana	348	Jharkhand	109	Gujarat	1010	Uttar Pradesh	740
3	Telangana	1	Tamil Nadu	929			Himachal Pradesh	20						
4	Chhattisgarh	275	Puducherry	27			Jammu & Kashmir	8	West Bengal	332				
5	Odisha	283	Goa	51			New Delhi	477	Assam	98				
6							Punjab	128	Meghalaya	2				
7							Uttarakhand	85	Tripura	5				
Total		1221		1649		2093		1106		599		1413		1210

#### 3.2 Detailed Scope of Work:

- The agency should identify some good and comfortable training venues with descent facilities to conduct refresher course.
- The agency is required to assist BEE in informing the candidates about the refresher course.
- Each Refresher course would include about (Approx.) 30 no. of officials. However, the no. may vary as per the realistic data.
- The Refresher course would be class room teaching and duration would be 2 days.
- The experts (at least 3 no./training) would be provided by the agency and the travel cost, lodging cost, honorarium to experts are to be borne by the agency.
- The cost of the venue, Lunch and snacks to the participants and all other arrangements and cost related to training are to be borne by the agency.
- The training module will be provided to the agency but the other necessary items like bag, letter pad, pen, pencil, are to be provided by the agency to the participants during the refresher course.

**Other terms: -**

- 1) The Agency is required to maintain records for the purpose of inspection by the authorized person of the Bureau.
- 2) The Agency is required to submit the CVs of the speakers well in advance and a monthly progress review meeting and report to BEE.
- 3) The project will be considered to be completed once the Certificates for Refresher Course to successful candidates have been awarded.
- 4) BEE officials (02 nos) may attend randomly the refresher course to check the quality of the Refresher course and the lodging / boarding & local travel should be borne by the agency for BEE officials.
- 5) The agency is required to be present at the venue till completion of assessment of the participants.
- 6) While awarding the work, BEE may inspect the corporate/regional office and infrastructure likely to be engaged.
- 7) The payments shall be made to the lead agency and not to the consortium parties.

**4.0 TIMELINE**

The above tasks need to be completed within 12 **months** from the date of award of work.

**5.0 TERMS OF PAYMENT**

The total duration of services of the agency will be for 12 **months**. The payment shall be made by BEE as per below terms:

- a) 30% of the order/ contract value on completion of the training of 30% of the candidates, within the first 4 months from the date of award of work, of the group awarded to the agency.
- b) 30% of the order/ contract value on completion of the training of 70% of the candidates, within the 8 months from the date of award of work, of the group awarded to the agency.
- c) 30% of the order/ contract value on completion of the training of 100% of the candidates, within the 12 months from the date of award of work, of the group awarded to the agency.
- d) 10% of the order/ contract value on completion of all related formalities of the award work.
- e) Monthly invoices can be raised.



**PENALTY CLAUSE: -**

Delay at any stage in execution of the contract due to reasons solely attributed to successful agency/firm/bidder beyond the time schedule as agreed or any extension thereof granted by the BEE shall attract penalty at the rate of 2.5% of the total contract value per week of delay subject to maximum of 10% of the total contract value.

**6.0 Qualification / Experience and Eligibility of the Firm****6.1 Eligibility criteria for the Firm/Company/Agency  
(Documentary proof to be provided against each criteria)**

- 1) Must be an agency / firm / company registered/ incorporated in India.
- 2) Must be in active business for a minimum period of 5 years and profitable for a minimum of 3 of last 4 years.
- 3) The agency / firm must have minimum annual turnover of INR 50.00 Lakhs or its equivalent in foreign currency for the last three (3) years i.e. FY 2015-16, 2016-17, and 2017-18.
- 4) Must have adequate capability to deploy adequate personnel, if required (Minimum employees should be 50).
- 5) Must not be involved in any major litigation that may have an impact of affecting or compromising the delivery of services as required under this contract.
- 6) Must not be black-listed by any Central / State Government / Public Sector Undertaking in India.
- 7) Organization may involve one more agency as partner only for meeting work experience and MoU for such must be submitted. However, the bidder can't change the consortium partner during the course of the study.
- 8) Must provide approach and methodology for the activities mentioned in the RFP.

**6.2 Qualification and Experience of the Firm/Agency (for team & related work)**

- 1) Must have experience of 5 projects in conducting similar course related to energy management of which 2 projects of Central Govt./State Govt.
- 2) The agency must have 1 senior expert having experience at least 10 years in the field of Energy Efficiency related activities to lead the assignment and must be BEE certified Energy Auditor. (Necessary documents along with CV of the official should be provided to substantiate the claim.)



- 3) The agency must have 5 knowledge experts (Excluding the lead personnel) having experience at least 3 years in the field of Energy Efficiency related activities.  
(Necessary documents along with CV of the officials should be provided to substantiate the claim.)
- 4) Must have at least 2 Energy Auditors/Energy Managers (Excluding the lead personnel). Necessary documents along with CV of the official should be provided to substantiate the claim.
- 5) Must have adequate infrastructure facilities to conduct the refresher courses. Availability of Regional training centers would be preferred.  
(List of the regional training institutes may be submitted)

However, BEE in its sole/absolute discretion can apply whatever criteria deemed appropriate in determining the responsiveness of the Proposal submitted by the respondents.

## **7.0 CRITERIA OF BID EVALUATION AND SELECTION PROCEDURE.**

### **7.1 Consideration of responsiveness**

Preliminary scrutiny of the Proposals will be made to determine whether they are complete, whether required processing fee has been furnished, whether the documents have been properly signed and whether the forms are generally in order. Proposals not conforming to such preliminary requirements will be prima facie rejected.

### **Responsiveness**

**Name of the Agency/Firm: -**

<b>Sl. No</b>	<b>Item</b>	<b>Required Response</b>
1	Has the agency/firm submitted the requisite bid processing fees?	Yes
2	Has the agency/firm submitted the requisite application fees?	Yes
3	Has the agency/firm submitted the requisite bid security fees?	Yes
4	Have all the pages required to be signed by the authorized representative of the agency/firm been signed?	Yes
5	Has the power of attorney been submitted in the name of authorized representative?	Yes
6	In the case of JV/consortium, whether the MOU/Contract Agreement has been submitted?	Yes

7	Has the agency/firm submitted all the required forms of the technical proposal?	Yes
8	Does the technical proposal contain any financial information?	No
9	Is the financial proposal submitted separately in a sealed cover?	Yes

If the response deviates from the above mentioned required response, the bid will not be considered for Preliminary Scrutiny.

## 7.2 Preliminary Scrutiny:

Sl. No	Item	Required Response	Requirement
1	Must be an agency / firm / company registered/ incorporated in India	Yes	Necessary documents should be provided
2	Must be in active business for a minimum period of 5 years	Yes	Necessary documents should be provided
3	Must be profitable for 3 of the last 4 years	Yes	Necessary documents should be provided (Balance Sheet & P & L A/C)
4	Must have minimum annual turnover of INR 50.00 Lakhs or its equivalent in foreign currency in at least two of the last three (3) years i.e. FY 2015-16, 2016-17, and 2017-18	Yes	Annual turnover of the last three (3) years i.e. FY 2015-16, 2016-17, and 2017-18 must be provided.
5	Minimum employees are 50 as of 31 <sup>st</sup> December, 2017.	Yes	No. of employees as of 31 <sup>st</sup> December, 2017 must be provided.
6	Must not be involved in any major litigation	NO	Undertaking should be submitted
7	Must not be black-listed by any Central / State Government / Public Sector Undertaking in India	NO	Undertaking should be submitted
8	Experience of sub-contractor including parent company may be stated	Yes	MoU to be submitted
9	Approach and Methodology is submitted	Yes	Approach and Methodology should be submitted.
10	Must have 3 BEE certified EA/EM	Yes	Certificate to be attached
11	Lead member is BEE certified energy auditor	Yes	Certificate to be attached

Sl. No.	Criteria for lead personnel		Requirement
12	Must be an employee of the bidding company.	Yes	Necessary document should be provided
13	Must be Graduate in Engineering from a recognized University or Institute.	Yes	Certificate to be provided
14	Must have experience of at least 10 years on energy efficiency.	Yes	Necessary document should be provided

In case the bidders do not fulfil the above requirement, the bid will not be considered for technical evaluation.

### 7.3 Evaluation of Quality

**Technical Evaluation:** Only the technical proposals considered as technically responsive would be evaluated based on the bidder's capabilities, experience, approach and methodology and the CV's of the proposed personnel and the scores would be given (out of 100). The weight age of various parameters considered for evaluating the technical proposals is as shown in the table below:

S. N	Parameter	Max. Marks*
<b>1</b>	<b>Experience of the Firm</b>	<b>30</b>
<b>1.1</b>	Experience with Similar assignments	10
<b>1.2</b>	Experience in conducting training programmes/workshops in Energy Efficiency sector	10
<b>1.3</b>	Experience with Central govt./State Govt./Govt. agencies	10
<b>2</b>	<b>Methodology, Work Plan and Understanding of TOR</b>	<b>10</b>
<b>2.1</b>	Clarity & understanding of TOR }	5
<b>2.2</b>	Approach & Methodology Proposed }	
<b>2.3</b>	Work Plan }	5
<b>2.4</b>	Timeline }	
<b>3</b>	<b>Key professional staff qualifications and competence for the assignment/job.</b>	<b>45</b>
<b>3.1</b>	Proposed Team Structure	10
<b>3.2</b>	Experience of the Lead Member in energy management related projects	10
<b>3.3</b>	Experience of the Team Members in energy management related projects	25
<b>4</b>	<b>Availability of Infrastructure facility</b>	<b>15</b>
<b>4.1</b>	Infrastructure details and List of Regional centres along with photographs to be submitted	15
<b>Total</b>		<b>100</b>

The allocation of marks for the above-mentioned criteria are shown in the tables below:

<b>S. NO.</b>	<b>Parameter</b>	<b>Criteria (year/ no.)</b>	<b>Marks</b>
<b>1</b>	<b>Experience of the Firm</b>		<b>30</b>
<b>1.1</b>	Experience with Similar assignments	$\geq 8$	10
	Others	$>5 \& < 8$	Pro rata
<b>1.2</b>	Experience in conducting training programme in Energy Efficiency	$\geq 8$	10
	Others	$< 5 \& < 8$	Pro rata
<b>1.3</b>	Experience with Central govt./State Govt./Govt. agencies	$\geq 5$	10
	Others	$> 2 \& < 5$	Pro rata
<b>2</b>	<b>Methodology, Work Plan and Understanding of TOR</b>		<b>10</b>
<b>2.1</b>	Clarity & understanding of TOR	Qualitative	5
<b>2.2</b>	Approach & Methodology Proposed	Qualitative	
<b>2.3</b>	Work Plan	Qualitative	5
<b>2.4</b>	Timeline	Qualitative	
<b>3</b>	<b>Key professional staff qualifications and competence for the assignment/job.</b>		<b>45</b>
<b>3.1</b>	Proposed Team Structure	$\geq 10$	10
	Others	$> 5 \& < 10$	Pro rata
<b>3.2</b>	Experience of one Lead member in energy efficiency related projects	$\geq 15$	10
	Others	$> 10 \& < 15$	Pro rata
<b>3.3</b>	Experience of the first team member In EE projects	$\geq 5$	5
	Others	$> 3 \& < 5$	Pro rata
<b>3.4</b>	Experience of the 2 <sup>nd</sup> team member in Energy Efficiency projects	$\geq 5$	5
	Others	$> 3 \& < 5$	Pro rata
<b>3.5</b>	Experience of the 3 <sup>rd</sup> team member in Energy Efficiency projects	$\geq 5$	5
	Others	$> 3 \& < 5$	Pro rata
<b>3.6</b>	Experience of the 4 <sup>th</sup> team member in EE projects	$\geq 5$	5
	Others	$> 3 \& < 5$	Pro rata
<b>3.7</b>	Experience of the 5 <sup>th</sup> team member in Energy Efficiency projects	$\geq 5$	5
	Others	$> 3 \& < 5$	Pro rata
<b>4</b>	Infrastructure details and List of Regional	Qualitative	<b>15</b>

	centres along with photographs to be submitted		
<b>Total</b>			<b>100</b>

**Note: The qualifying mark for the bidders is 70.**

#### **7.4 Evaluation under Quality and Cost Based Selection (QCBS):**

- 1) All the bidders / applicants whose bids are found to be qualified in quality evaluation shall be considered for financial evaluation. All bidders securing 70 or more in the technical scores (hereinafter called “Qualified Bidders”) shall be eligible for the Financial Proposal evaluation.
- 2) The BEE shall notify those agencies/firms whose proposals did not meet the minimum qualifying standard or were considered non-responsive to the RFP and/or TOR, indicating that their financial proposals will be returned unopened after completing the selection process.
- 3) BEE shall simultaneously notify the agencies/firms that have successfully satisfied the qualifying standard and indicate the date and time set for opening the financial proposals at a suitable date.
- 4) The financial proposals shall be opened publicly in presence of the representatives of the technically qualified consultants who choose to attend. The name of the consultant, the quality scores, and the proposed prices shall be read and recorded when the financial proposals are opened.
- 5) For the purpose of evaluation, the total cost shall include all taxes and duties (excluding GST) and other reimbursable expenses, such as travel, translation, report printing, or secretarial expenses.
- 6) If there are conditions attached to any financial proposal, which shall have bearing on the total costs as indicated in the proposal, the Committee shall reject any such proposals as non-responsive financial proposal.
- 7) The financial proposals will be ranked in terms of their total evaluated cost. The least cost proposal will be ranked as L-1 and the next higher and so on will be ranked as L-2, L-3 etc. The least cost proposal (L-1) will be considered for award of contract. The committee will put up a report on financial evaluation of the technically qualified consultants to the competent finance authority along with the recommendation that the least cost proposal (L-1) can be approved / invited for negotiation and for final award of contract.

Note: -

The financial bid shall be evaluated and marks awarded as per criteria given below: -

- The agency quoting lowest cost may be given full marks
- All other firms will be awarded that marks which results out after deducting X out of full marks. (X represents a number which is that percentage of full marks, which is equal to the percentage by which their quoted price is higher than the price quoted by the first lowest.)

Example: -

The price quoted by agencies "A" "B" "C" & "D" for any component of the financial bid is Rs. 100/-, Rs. 115/-, Rs. 125/-, and Rs. 135/- respectively. The marks to be awarded for the financial bids would be as below: -

Name of the Agency	Price quoted for financial bid	Difference in price with the lowest quoted price (column 2-1)	Percentage by which the price is higher than the first lowest	Marks to be awarded
1	2	3	4	5
A	100	0.00	0	100
B	115	15.00	15%	85
C	125	25.00	25%	75
D	135	35.00	35%	65

### 7.5 Selection of Agency

The agency scoring the highest marks after aggregating the marks awarded for Technical and Financial bids shall be awarded the work.

### 8.0 RFP FORMS

The proposal is to be submitted in the following format along with the necessary documents as listed. The proposal shall be liable for rejection in the absence of requisite supporting documents.

**8.1 RFP Form 1: Letter of Proposal Submission**

The Secretary  
Bureau of Energy Efficiency  
4th Floor, SewaBhavan,  
R.K. Puram,  
New Delhi -110066 India

**Sub: Technical Proposal for “Hiring of an agency to of an agency/firm for CONDUCT OF REFRESHER COURSE FOR ENERGY AUDITOR & ENERGY MANAGER”.**

Sir/ Madam,

The undersigned is the authorized representative of the (Name of Agency/firm), having read and examined in detail the complete RFP document in respect of Hiring of an agency to CONDUCT OF REFRESHER COURSE FOR ENERGY AUDITOR & ENERGY MANAGER do hereby express their interest to provide services as specified in the scope of work.

Thanking you.

Yours faithfully,

Authorized Signature: -----

Name and Title of Signatory: -----

Name of the Firm: -----

Seal: -----

**8.2 Correspondence Details**

Our correspondence details are:

1	Name of the Agency:	
2	Address of the Agency:	
3	Name of the contact person to whom all references shall be made regarding this tender:	

4	Designation of the person to whom all references shall be made regarding this proposal:	
5	Address of the person to whom all references shall be made regarding this proposal:	
6	Telephone (with STD code):	
7	Mobile No.	
8	Fax No. (with STD code):	
9	E-Mail of the contact person:	

### 8.3 Document forming part of Proposal

We have enclosed the following:

RFP Form 2: Eligibility and Other details

RFP Form 3: Prior Experience

RFP Form 4: Approach and Methodology and Proposed Work Plan including the timelines with excel based chart

RFP Form 5: Resumes of the Lead member and other members in the proposed team.

RFP Form 6: Declaration Letter.

Bid Security of INR 2,00,000/- (INR Two lakhs Only)

Bid Application Fee of INR 1,000/- (One Thousand only)

Bid processing fees of INR 5,000/- (INR Five Thousand Only)

Registered Power of Attorney executed by the agency in favor of the Principal Officer or the duly Authorized Representative, certifying him/her as an authorized signatory for the purpose of this RFP.

(Agency/firm shall mention the Form No. clearly over the respective enclosure of the technical proposal)

We hereby declare that our Proposal is made in good faith and the information contained is true and correct to the best of our knowledge and belief.

Thanking you,

Yours faithfully,

(Signature of the Authorized Representative)



Name :  
Designation :  
Seal :  
Date :  
Place :  
Business Address:

	Witness:	
_____	Signature	_____
_____	Name	_____
_____	Address	_____
_____		_____
_____	Date	_____

**8.4 RFP Form 2: Eligibility and Other Details**

1	Name of Firm/Company:			
2	Year and Place of Registration/Incorporation:			
3	Total No. of Employees:			
4	Prior experience in conducting training programmes and workshops related to energy management:	Yes/No:		
	If Yes, total Number of years of work experience in conducting training programmes and workshops related to energy management:			
	Number of training programmes related to Energy Management done for Central Govt. /State Govt. (effectively from FY 2017-18)			
	If, No Number of similar training programmes and workshops for Central and State Government (effective FY 2017-18)			
		FY 2015-16	FY2016-17	FY 2017-18
5	Annual Turnover from Consultancy Services**			
6	Net Worth **			

\* Enclose a copy of Registration document

\*\* Enclose a copy of Audited Financial Statement

**8.5 RFP Form 3: Prior Experience**

Please indicate the experience in the field of training or capacity building programme on energy efficiency or similar kind of projects of Central and State Government in the format provided below, mention the details of the assignments directly related to the relevant field. Firms having larger experience must furnish the details of all other similar assignments separately in the same format as provided below. Kindly Note, the agency/firm shall mention the details of assignments done during last 4 years only.

Name of Agency/Firm:	
Assignment/job name:	
Nature of Assignment:	
Description of Project:	
Approx. value of the contract (in INR):	
Country:	
Location within country:	
Duration of Assignment/job (months) :	
Name of Employer:	
Address and contact details:	
Total No of staff-months of the Assignment/job:	
Approx. value of the Assignment/job provided by your firm under the contract (in INR):	
Start date (month/year):	
Completion date (month/year):	
Total duration (months)	
Name of associated Consultants, if any:	
No of professional staff-months provided by associated Consultants:	
Name of senior professional staff of your firm involved and functions performed.	
Description of actual Assignment/job provided by your staff within the Assignment/job (attach separate sheet if required):	

Note: Please attach Letter of Intent or Purchase Order or certificate of successful completion for each project, from the respective Client(s).

#### **8.6 RFP Form 4: Approach and Methodology and Proposed Work Plan including the timelines with excel based chart**

[Explain your understanding of the objectives of the Assignment/job, approach to the Assignment/job, methodology for carrying out the activities and obtaining the expected output, and the degree of detail of such output. You should highlight the problems being addressed and their importance and explain the technical approach you would adopt to address them. You should also explain the methodologies you propose to adopt and highlight the compatibility of those methodologies with the proposed approach].  
Maximum 4 pages

**Note:** Duration of activities shall be indicated in the form of a bar chart.

### **8.7 RFP Form 5: Resumes of the members in the proposed team.**

Agency/Firm shall submit full resumes of the project leader and members of the team proposed for the assignment, including contact information as per the following format (in max. 2 pages).

- 1) Name:
- 2) Complete Contact Information:
- 3) Proposed Position:
- 4) Educational Qualification:
- 5) Employment Record:
- 6) Relevant Work Experience / Work Undertaken that best illustrates capability to handle the proposed task:
- 7) Certification / Signature:

### **8.8 RFP Form 6: Declaration Letter**

Declaration Letter on official letter head stating the following:

We are not involved in any major litigation that may have an impact of affecting or compromising the delivery of services as required under this contract

We are not black-listed by any Central / State Government / Public Sector Undertaking in India

Witness:		Agency/Firm:	
Signature	_____	Signature	_____
Name	_____	Name	_____
Address	_____	Designation	_____
	_____	Company	_____
Date	_____	Date	_____

Annexure – 1

**FORMAT FOR FINANCIAL PROPOSAL**

[Location, Date]

FROM: (Name of Firm)

TO: (Name and Address of Client)

**Subject: Financial Proposal for “Hiring of an agency to CONDUCT REFRESHER COURSE FOR ENERGY AUDITOR & ENERGY MANAGER”.**

I / We, the undersigned, offer to provide the consulting services for the above in accordance with your Request for Proposal dated [Date], with our Technical and Financial Proposals.

The financial proposal shall take into account all expenses and tax liabilities associated in execution of the deliverables as per the RfP except the GST. GST, if any, will be applicable as per prevailing rates.

Our financial proposal shall be binding upon us subject to the modifications resulting from contract negotiations, up to expiration of the validity period of the Proposal, i.e., [Date].

Price Bid					
Name of Project: Request of proposal for Hiring of any agency to conduct Refresher Course for Energy Auditors & Energy Managers.					
S.No.	Name of Group	Number of Workshops	Per Workshop rate excluding GST as per scope of work (in Rs.)	Total cost excluding of GST as per scope of work (in Rs.)	Total cost excluding of GST as per scope of work (in words)

Our financial proposal shall be binding upon us subject to the modifications resulting from contract negotiations, up to expiration of the validity period of the Proposal, i.e., [Date].

We confirm that, in competing for (and, if the award is made to us, in executing) the above contract, we will strictly observe the laws against fraud and corruption in force in India namely "Prevention of Corruption Act 1988".

We understand you are not bound to accept any Proposal you receive.

Yours sincerely,

Authorized Signature: \_\_\_\_\_

Name and Title of Signatory: \_\_\_\_\_

Name of the Firm: \_\_\_\_\_

Seal: \_\_\_\_\_

\*\*\*\*\*