



**sanedi**

South African National Energy  
Development Institute.

## REQUEST FOR QUOTATION JOBS IMPACT REPORT FOR 12L TAX INCENTIVES

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 f Bidder** ..... **Date** .....

<b>RFQ Number</b>	2922
<b>Date of RFQ</b>	22 November 2022
<b>SANEDI Contact</b>	<p>All enquiries must be directed to:</p> <p>Name: Ms Nondumiso Buthelezi  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</b>	<p>07 December 2022 at <b>11:00am</b></p> <p>NO LATE SUBMISSIONS WILL BE ACCEPTED.</p>
<b>Submission methods</b>	<p>The submissions should be made to the following email:</p> <p><a href="mailto:quotes.procurement@sanedi.org.za">quotes.procurement@sanedi.org.za</a></p> <p><b>NB: failure to submit in the correct email will render your submission non-responsive.</b></p>
<b>Work specification (and Technical specifications)</b>	<p><b>1. Project Background</b></p> <p>The 12L tax incentive, according to the Income Tax Act, 1962 (Act No. 58 of 1962) provides an allowance for businesses to implement energy efficiency savings. The savings allow for tax deduction of 95c/kWh saved on energy consumption .</p> <p>The incentive was promulgated 1st of November 2013 with an incentive value of 45c/kWh which was revised to 95c/kWh in February 2015. The tax incentive is claimable until December 2025. The incentive allows tax deduction for all energy carriers except for renewable energy sources. For the eligibility to claim the deductions, measurements must be in kWh equivalent. The verified and measured energy efficiency saving must be over a period of 12 months known as implementation/assessment period which is compared in contrast with the 12 months of baseline measurement. The baseline measurement and savings are verified and measured by a SANAS accredited Measurement and Verification (M&amp;V) Body which assigns an M&amp;V professional.</p> <p>SANEDI was established by the National Energy Act. The role of SANEDI involves, amongst others, ensuring that South Africa will have the necessary information and planning support for a sustainable and secure energy future that will satisfy the country's economic, social, and environmental needs. SANEDI is further tasked with influencing or facilitating an immediate and critical change in the country's energy culture towards more considered and sustainable energy practices.</p>

In fulfilling its responsibilities under section 12L, SANEDI must –

- Appoint suitably qualified persons to consider the reports submitted.
- Consider, keep, and maintain all reports submitted by taxpayers claiming the allowance.
- Issue taxpayers with certificates containing the relevant information.
- Create and maintain a database of all issued certificates.
- Provide the Minister and the SARS Commissioner with access to the reports and to the database. Before a certificate is issued, SANEDI must also satisfy itself on the accuracy of the information contained in the reports by investigating or causing to be investigated any energy-efficiency savings of the taxpayer

This information must –

- Comply with the South African National Standard – “SANS50010:2018: Measurement and verification of energy savings” as published by the South African Bureau of Standards (SABS) Standard Division.
- Be an accurate reflection of the energy-efficiency savings for which a deduction is claimed by the taxpayer during the year of assessment.
- Comply with the 12L Regulations.

The purpose of this project is to report on the jobs impact of the 12L Tax Incentives programme from inception in November 2013 to date. The nature of the jobs created will need to be specified in terms of gender, nationality, skills set, disability, race, and age. This will allow an analysis of the extent to which the tax incentives have benefitted the economy and the previously disadvantaged in South Africa. The Jobs Impact report should have a detailed projection of future Jobs given the current programme sunset clause of December 2025.

## **2. Project Objective**

- The objective of this project is to evaluate the impact that the 12L Tax Incentives Programme has had in terms of employment creation from the time of inception to date.

### **3. Scope of works**

The project must consider the following and related matters.

#### **3.1 Work package 1: 12L Tax Incentives beneficiaries from inception to date.**

- A detailed account of the beneficiaries of the 12L Tax Incentives Programme from inception.
- 12L Tax Incentives claims from inception and which sectors benefitted the most.
- The Energy Efficiency impact of 12L claims.
- Any other issues deemed relevant by the service provider.

#### **3.2 Work package 2: Jobs created as a direct result of 12L Tax incentives**

- A detailed summary of the jobs created through the tax incentives process. The jobs must be reported in terms of existing, permanent, or temporary jobs.
- The demographics for the jobs created.
- The income streams created and their effect in the wider economy.
- The skills set's that were most needed in the jobs created space.
- Any other issues deemed relevant by the service provider.

#### **3.3 Work package 3: Project Management**

The project shall be managed through a Project Steering Committee (PSC) composed of members including:

- A representative of SANEDI/Energy Efficiency Programme;
- A representative of DMRE;
- Up to three representatives from the SANEDI identified stakeholder pool;
- Other persons may be invited by SANEDI as and when deemed appropriate; and
- SANEDI shall chair the progress meetings.

The Steering Committee shall meet as follows:

- Inception Meeting – to initiate the Project and agree on specific details;
- Thereafter, progress meetings on a monthly basis.
- A final closure meeting after completed final report submission.

#### **3.4 Work package 4: Project Administration**

The service provider will be expected to:

- Record written minutes of each Project Steering Committee
- Circulation of the minutes within five working days of the meeting
- Progress reports to be addressed at progress meetings
- Progress reports submitted at least three days before a progress meeting

**3.5 Expected Deliverables**

- Monthly minuted progress meetings with the project steering committee (PSC)
- Draft reports on each work package (WP) during progression, for inputs from the PSC and other stakeholders deemed relevant/necessary by SANEDI
- Final report containing the complete study (all WPs)
- Five hard copies (laid out, bound and printed)
- Two electronic copies (editable Word version and PDF print layout)
- Presentations to SANEDI and DMRE and others as required

**4. Project duration:**

- 4 months

**Evaluation Criteria**

Criteria	Scoring Guidelines (1-10)	Weighting
<p>1. Company must be in business for 5 or more and have experience in the energy sector.</p> <p>Description of company profile, company history including years in business, description of core business, list of previous work including studies, published papers, etc, evidence of involvement in the ongoing South African energy and energy efficiency sector would serve as proof.</p>	<p>(a) extensive relevant capacity and capabilities within the organisation and 5 "or more years' experience =10</p> <p>(b) good relevant capacity and capabilities within the organisation and 4 years' experience = 8</p> <p>(c) relevant capacity and capabilities within the organisation and 3 years' experience = 5</p> <p>(d) little to no relevant capacity, capabilities and experience within the organisation with little to no evidence of previous relevant work= 1</p>	30%
<p>2. 5 signed reference letters on client company letterhead to support the company experience provided in second evaluation criteria.</p>	<p>(a) 5 reference letters = 10</p> <p>(b) 4 reference letters = 8</p> <p>(c) 3 reference letters = 6</p> <p>(d) 2 reference letters = 4</p> <p>(e) 1 reference letter = 2</p>	20%

	<p>3. Project Lead must have an appropriate degree in relevant field.</p>	<p>(a) M.Eng. or MSc Electrical/Energy Management=10  (b) BSc Eng./Science (Hons) Electrical/Energy Management=5  (c) BSc Eng./Science Electrical/Energy Management=1</p>	<p>10%</p>								
	<p>4. Methodology of the study.  Detailed methodology of the work to be undertaken – not merely a repetition of the “Scope of Work” as detailed in Section 5 above.</p>	<p>(a) Detailed methodology with clear timelines = 10  (b) Methodology with no details or clear timelines = 5  (c) Repetition of scope of works= 1</p>	<p>20%</p>								
	<p>5. Project Plan</p>	<p>a) Detailed project plan with Gantt Chart and clear timelines and deliverables=10  b) Acceptable project plan with clear timelines and deliverables=5  c) Poor project plan=1</p>	<p>20%</p>								
	<p>Threshold</p>		<p>70</p>								
	<p>Total</p>		<p>100</p>								
<p><b>Preferential Point system</b></p>	<p><b>The Bid will be evaluated on 80/20 Preferential Point System according to the Preferential Procurement Policy Framework Act,2000</b>  The points scored out of 80 should be calculated according to the following formula:</p> <p>(i) The 80/20 preference point system</p> $Ps = 80 \left( 1 - \frac{Hs - Rs}{Rs} \right)$ <p>where  Ps = points scored for functionality and price of the bid/proposal under consideration  Hs = highest percentage scored by any acceptable bidder for functionality and price  Rs = percentage scored for functionality and price by bid/proposal under consideration</p>										
<p><b>The maximum score</b></p>	<p>The maximum score for this bid shall be awarded as follows:</p> <table border="1" data-bbox="415 1614 1515 1753"> <thead> <tr> <th>POINTS</th> <th>PRICE</th> </tr> </thead> <tbody> <tr> <td>BBBEE Status level of Contribution</td> <td>20</td> </tr> <tr> <td>Points for price</td> <td>80</td> </tr> <tr> <td><b>Total points for price and BBBEE do not exceed</b></td> <td><b>100</b></td> </tr> </tbody> </table>			POINTS	PRICE	BBBEE Status level of Contribution	20	Points for price	80	<b>Total points for price and BBBEE do not exceed</b>	<b>100</b>
POINTS	PRICE										
BBBEE Status level of Contribution	20										
Points for price	80										
<b>Total points for price and BBBEE do not exceed</b>	<b>100</b>										
<p><b>Terms and Conditions</b></p>	<p>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> .</p>										

<b>Quoted Price excluding Disbursements VAT inclusive</b>	<b>(Attach a formal quotation on company official letterhead to this RFQ)</b>  R
<b>Discounted amounts</b>	R
<b>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 BBBEE Bid Declaration</li> <li>3. Attach valid tax clearance</li> <li>4. Certified BBBEE certificate</li> <li>5. CSD Report</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?		
	If so, furnish the following particulars:  Name of person / director / trustee / shareholder/ member		
	Name of state institution at which you or the person connected to the bidder is employed :		
	Position occupied in the state institution		
	Any other particulars:		
	If you are presently employed by the state, did you obtain the appropriate authority to undertake remunerative work outside employment in the public sector?		
	If yes, did you attach proof of such authority to the bid document?  <u>(Note: Failure to submit proof of such authority, where applicable, may result in the disqualification of the bid.</u>		
	If no, furnish reasons for non-submission of such proof:		
	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?		

	If so, furnish particulars:		
	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 .....

**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 .....

**B-BBEE Bid Declaration**

**BEE Terms and Conditions**

If it is detected that false information regarding the B-BBEE status level of contribution, local production content, or any other matter which will affect or has affected the evaluation of the tender, or where the tender has failed to declare any subcontracting arrangements, the purchaser may, in addition to any other remedy it may have –

- (a) disqualify the person from the bidding 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 favorable arrangements due to such cancellation;
- (d) restrict the bidder or contractor, its shareholders and directors, or only the shareholders and directors who acted on a fraudulent basis, 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

Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:		
<b>B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED</b>  (Points claimed for BBEE must be substantiated by means of a certified B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or an Accounting Officer as contemplated in the CCA).	<b>Points Claimed</b>  .....	
<b>SUB-CONTRACTING</b>	<b>YES</b>	<b>NO</b>
Will any portion of the contract be sub-contracted?		
If yes, indicate:  what percentage of the contract will be subcontracted?	%	
the name of the sub-contractor?		
the B-BBEE status level of the sub-contractor?		
is the sub-contractor an EME?		

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

Certify that the B-BBEE information furnished on this declaration form is true and correct and attach a current broad-based black economic empowerment certificate as verified by an accredited agency.

i accept that, in addition to cancellation of a contract, action may be taken against me should this declaration prove to be false.

Name of Enterprise Bidding: .....

Name of Authorised Representative .....

Signature of Authorised Bidder .....

Date .....