



REQUEST FOR QUOTATION FOR APPOINTMENT OF A CONSULTANT FOR DEVELOPMENT OF THE 12L TAX INCENTIVE TECHNICAL GUIDELINE

NAME OF BIDDER.....

POSTAL ADDRESS

STREET ADDRESS

CONTACT PERSON

TELEPHONE NUMBER Code Number

CELL PHONE NUMBER Code Number

FACSIMILE NUMBER Code Number

E-MAIL ADDRESS

Signature of Bidder **Date**

DISCLAIMER:

- SANEDI has not appointed external consultants to liaise with bidders on any matter. All queries regarding this bid must be submitted in writing to the Supply Chain Management Unit of SANEDI.
- SANEDI issues this invitation for bids in good faith; however, it reserves the right to:
 - Appoint more than one service provider, if required.
 - Cancel or delay the selection process at any time, without explanation.
 - Not select any of the respondents to this bid invitation, without explanation.
 - Exclude certain services, without explanation.
- SANEDI has zero tolerance for fraudulent or corrupt activities.
- Any attempt by SANEDI employees to solicit bribes from bidders is unlawful and must be reported immediately.
- If a bribe is paid, SANEDI will not be liable for any financial loss, as no SANEDI employee or committee member may request payment to influence a bid outcome.
- Fraud, bribery, and corruption are unlawful, and SANEDI will disqualify any bidder found to be involved from further consideration in the tender process.
- A contract will only be valid once reduced to writing and signed by the designated responsible person of both parties. At SANEDI, this is the Chief Executive Officer or his/her duly authorized delegate.

RFQ Number	RFQ4625
Date of RFQ	18 November 2025
SANEDI Contact	All enquiries and RFQ submissions must be directed to : Name: SCM Department Tel: 011 038 4300 Enquiries: e-mail address: enquiries.procurement@sanedi.org.za Website address: www.sanedi.org.za
Closing date & Time Electronic - Submission	27 November 2025 at 11:00am E-mail submission only: quotes.procurement@sanedi.org.za
Work specification (and Technical specifications)	1. Project Background 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. 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&V) Body which assigns an M&V professional. 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 of Finance and the SARS Commissioner with access to the reports and to the database as and when required. 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.

	2. Project Objective The objective of this project is to develop a 12L Tax Incentive Technical Guideline that will assist the experts that review applications with the following: •To encourage compliance with the 12L Tax Incentive Regulation to ensure quality and consistent outcomes of the review process, •Provide procedures to be followed in reviewing 12L Tax Incentive applications to ensure a standard approach by panelists , •Provide guidance on the technical review of energy efficiency projects and the verification of energy savings. •Provide a standardized analysis of the past critical matters from past submission to assist with future adjudication.
Scope of Works	3. Scope of Works 3.1 Develop a 12L Tax Incentive Technical Guideline encompassing all aspects of the review process including but not limited to the following: • Compliance with the National Treasury 12L Tax Incentive Regulation first promulgated in November 2013, • Compliance with SANS 50010:2018 standard, • Compliance with SANS TG 50- 02 standard, • Compliance with other publications on the incentive, including but not limited to the SARS Interpretation Note 95 (Issue 3), • Compliance with any other regulations that affect the 12L Tax Incentive process e.g. - National Energy Act 34 of 2008 -Carbon Tax Act 15 of 2019 - Climate Change Act 22 Of 2024 -Post-2015 National Energy Efficiency Strategy (NEES) -National Environment Management Act 107 of 1998 •Highlight data collection and analysis processes and acceptable Measurement and Verification methodologies, •Outline acceptable approaches for baseline and performance assessment models development, •Any other technical issues that need to be considered in verifying energy savings in submitted claims. •Provide a standardised analysis of the past critical matters from past submissions. •Work in close consultation with industry technical experts in consolidating the guideline document.

EVALUATION CRITERIA	Evaluation Criteria				
	TECHNICAL INFORMATION	SCORING GUIDELINES [scale 0-5]	WEIGHTING PERCENTAGE	EVALUATOR'S SCORE	MOTIVATION FOR THE SCORE
	1. Company Experience: Quality work experience on similar projects where development of technical documents/guidelines was required. N.B. A list of previous work done must be provided and technical documents developed highlighted.	5 = 5 years or more experience in development of technical documents/guidelines or similar work 4 = 4 years' experience in development of technical documents/guidelines or similar work 3 = 3 years' experience in development of technical documents/guidelines or similar work	20%		
		2 = 1 to 2 years' experience in development of technical documents/guidelines or similar work 0 = no experience in development of technical documents/guidelines or similar work			
	2. Project Team Qualifications: The lead and team must have obtained a professional qualification/s in Engineering/ Science or related field, reflected in a short CV. Additional accredited certifications will be an added advantage i.e., CEM, CMVP etc.	5 = ~~Honours~~ or Post-graduate degree Engineering/ Science or related field and 2 additional accredited certifications. 4 = Undergraduate degree Engineering/ Science or related field and 1 additional accredited certifications. 3 = National Diploma or N6 in Engineering/ Science or related field And 1 additional accredited certifications. 2 = Matric (Grade 12) or N5. 0 = No qualification	30%		

	3. Project Methodology: Detailed methodology of the work to be undertaken (comprehensive project plan with project timelines and milestones) – not merely a repetition of the “Scope of Work” as aforementioned in sections above	5 = Detailed methodology that includes other factors, not directly addressed above, but deemed necessary for the project to be successful. 3= Outline of methodology as per scope of work 2= Basic repetition of the “Scope of Work” 0= No Methodology provided	30%		
	4. Reference Letters: from different companies they worked with on similar projects. The letters should be on company letterhead, signed by the designated manager and dated.	5 = 5 or more reference letters 4 = 4 reference letters 3 = 3 reference letters 2 = 2 reference letters 1 = 1 reference letter	20%		
		0 = 0 reference letter			

Terms and Conditions	The RFQ shall be subjected to the SANEDI procurement terms and conditions which can be found on www.sanedi.org.za . New suppliers are requested to apply for registration as suppliers on the database as no RFQs will be considered without suppliers firstly being registered on the supplier database.				
Quoted Price excluding Disbursements VAT inclusive	(Attach a formal quotation on company official letterhead to this RFQ) R				
Discounted amounts Disbursements VAT inclusive	R				
Total Amount VAT inclusive	R				

Other Requirements	The supplier must submit the following returnable schedules: 1. Pricing schedule 2. Attach SBD 4 and SBD 6.1 3. Certified BBBEE certificate Forms are available on www.sanedi.org.za
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SBD 4: Bidder's Declaration of Interest

BIDDER'S DISCLOSURE

1. PURPOSE OF THE FORM

Any person (natural or juristic) may make an offer or offers in terms of this invitation to bid. In line with the principles of transparency, accountability, impartiality, and ethics as enshrined in the Constitution of the Republic of South Africa and further expressed in various pieces of legislation, it is required for the bidder to make this declaration in respect of the details required hereunder.

Where a person/s are listed in the Register for Tender Defaulters and / or the List of Restricted Suppliers, that person will automatically be disqualified from the bid process.

2. Bidder's declaration

2.1 Is the bidder, or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest¹ in the enterprise,

employed by the state?

YES/NO

2.1.1 If so, furnish particulars of the names, individual identity numbers, and, if applicable, state employee numbers of sole proprietor/ directors / trustees / shareholders / members/ partners or any person having a controlling interest in the enterprise, in table below.

Full Name	Identity Number	Name of State institution

¹ the power, by one person or a group of persons holding the majority of the equity of an enterprise, alternatively, the person/s having the deciding vote or power to influence or to direct the course and decisions of the enterprise.

2.2 Do you, or any person connected with the bidder, have a relationship with any person who is employed by the procuring institution? **YES/NO**

2.2.1 If so, furnish particulars:

.....

.....

2.3 Does the bidder or any of its directors / trustees / shareholders / members / partners or any person having a controlling interest in the enterprise have any interest in any other related enterprise whether or not they are bidding for this contract? **YES/NO**

2.3.1 If so, furnish particulars:

.....

.....

3 DECLARATION

I, the undersigned, (name)..... in submitting the accompanying bid, do hereby make the following statements that I certify to be true and complete in every respect:

3.1 I have read and I understand the contents of this disclosure;

3.2 I understand that the accompanying bid will be disqualified if this disclosure is found not to be true and complete in every respect;

3.3 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 consortium² will not be construed as collusive bidding.

3.4 In addition, there have been no consultations, communications, agreements or arrangements with any competitor regarding the quality, quantity, specifications, prices, including methods, factors or formulas used to calculate prices, market allocation, the intention or decision to submit or not to submit the bid, bidding with the intention not to win the bid and conditions or delivery particulars of the products or services to which this bid invitation relates.

3.4 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.

3.5 There have been no consultations, communications, agreements or arrangements made by the bidder with any official of the procuring institution in relation to this procurement process prior to and during the bidding process except to provide clarification on the bid submitted where so required by the institution; and the bidder was not involved in the drafting of the specifications or terms of reference for this bid.

3.6 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

² Joint venture or Consortium means an association of persons for the purpose of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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.

I CERTIFY THAT THE INFORMATION FURNISHED IN PARAGRAPHS 1, 2 and 3 ABOVE IS CORRECT.

I ACCEPT THAT THE STATE MAY REJECT THE BID OR ACT AGAINST ME IN TERMS OF PARAGRAPH 6 OF PFMA SCM INSTRUCTION 03 OF 2021/22 ON PREVENTING AND COMBATING ABUSE IN THE SUPPLY CHAIN MANAGEMENT SYSTEM SHOULD THIS DECLARATION PROVE TO BE FALSE.

.....	
Signature	Date

.....	
Position	Name of bidder

1. Preference Points

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

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

1. GENERAL CONDITIONS

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

1.2 Preference Points applicable:

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

1.3 Points for this tender shall be awarded for:

(a) Price; and

(b) Specific Goals.

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

	POINTS
Price	80
Specific Goals	20
Total points for price and specific goals	100

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

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

2. DEFINITIONS

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

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

3. FORMULAE FOR PROCUREMENT OF GOODS AND SERVICES

3.1. POINTS AWARDED FOR PRICE

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

$$\begin{array}{ccc}
 \text{80/20} & \text{or} & \text{90/10} \\
 P_s = 80 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right) & \text{or} & P_s = 90 \left(1 + \frac{P_t - P_{max}}{P_{max}} \right)
 \end{array}$$

Where

P_s = Points scored for price of tender under consideration

P_t = Price of tender under consideration

P_{min} = Price of lowest acceptable tender

4. POINTS AWARDED FOR SPECIFIC GOALS

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

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

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

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

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

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

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

		Persons with disability less than 5% - 0%	0%	
TOTAL FOR SPECIFIC GOALS	20			

DECLARATION WITH REGARD TO COMPANY/FIRM

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

4.4 Company registration number:.....

4.5 TYPE OF COMPANY/FIRM

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

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

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

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

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SIGNATURE(S) OF TENDERER(S)	
SURNAME AND NAME:	
DATE:	
ADDRESS:	
	
	
	