South African National Energy Development Institute.

REQUEST FOR QUOTATION

FOR

DEVELOPMENT OF PROPOSAL AND BUSINESS CASE FOR ENERGY EFFICIENCY AND DEMAND SIDE MANAGEMENT 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 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 Members 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 person responsible for both parties. At SANEDI, this is the Chief Executive Officer or his/her duly authorized delegate.

RFQ Number	**RFQ 1226 – Development of Proposal and Business Case for Energy Efficiency and Demand Side Management Incentives.**
Date of RFQ	11 August 2026
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 & Electronic Time - Submission	**Thursday the 20th of August 2026 at 11:00am** **E-mail submission only: quotes.procurement@sanedi.org.za**
Scope of works	**1. Project Background** SANEDI EEDSM has successfully implemented and administered the Section 12L tax incentive from inception to date. Currently, the Section 12L tax incentive is the main industrial policy mechanism tasked with incentivizing and promoting energy efficiency in the commercial and industrial sectors. The history of incentive administration within the SANEDI EEDSM programme includes the Section 12i Tax incentive, which had a sunset clause of 31 March 2020, and the Section 12L Tax incentive, which currently has a sunset clause of 31 December 2030. The 12L Tax Incentive has been successful in achieving energy savings as demonstrated by its impact on the economy. There are just over 389 Projects that have benefited from the incentive since its inception in 2013. The energy savings that have been achieved through these certified projects are 34.59 TWh. The Tax Incentive value of R29.35 billion has been earned through SARS. In terms of the impact on climate change targets for the country, the incentive has led to 33.06 $MtCO_2$ avoiding GHG emissions and contribution to South Africa's NDC. The certified projects have also led to the creation of estimated direct and indirect jobs created to date of 7780. The incentive continues to have the desired impact in reducing energy consumption and GHG emissions through the uptake of energy efficient technologies. The 12L Tax Incentive is currently mostly benefitting profitable industries and mining companies. This may be because of the high M&V costs that are a requirement under the 12L Regulation. The M&V costs may be a deterrent in terms of small enterprises applying for the incentive. There is a need to develop and launch new incentives for municipal and residential sectors amongst others to ensure that all sectors of the economy are covered in terms of energy efficiency. New incentives that meet the needs of various sectors must be developed and implemented to increase the uptake of new energy efficiency technologies in the economy. There is a requirement to develop and launch new incentives inclusive of municipal and residential sectors. Leveraging the successful implementation of these two key energy efficiency industrial instruments, which have

attracted substantial investment in energy efficiency and served as a significant driver for improved efficiencies, as well as a reduction in inefficient technologies and the promotion of cleaner production. The EEDSM subprograms on Incentives aims to enhance the focus on energy efficiency-based incentives by initiating and introducing additional energy incentives as a mechanism that supports the implementation of South Africa's Energy Policy and the National Energy Efficiency Strategy (NEES).

2. Project Objective

The purpose of this Request for Quotation (RFQ) is for:

A CONSULTANT TO DEVELOP:

1) **A PROPOSAL FOR NEW ENERGY EFFICIENCY INCENTIVE/S FOR SOUTH AFRICA and,**
2) **A BUSINESS CASE FOR NEW ENERGY EFFICIENCY INCENTIVE/S FOR SOUTH AFRICA.**

The purpose of the new incentive is to expand Energy Incentives to include SMMES, Municipal and Residential Sectors. The new incentives must benefit those sectors of the economy that are currently not fully benefiting from the 12L Tax Incentive.

Project Deliverables

- A detailed proposal on new energy efficiency incentives that can be introduced in South Africa benefitting primarily Municipal, SMMES and Residential Sectors.
- A detailed Business Case for the identified new energy efficiency incentives.

3. Scope of Works

The service provider is required to deliver the following:

3.1 Work package 1: Development of Proposals for New Energy Efficiency Incentives

- Develop at least five (5) new energy efficiency incentives that can be introduced in South Africa benefitting however not limited to the following sectors Municipal, SMMES and Residential sectors.
- Develop a comprehensive proposal for the five identified incentives including a "do nothing" baseline.
- Assess the proposed incentives for technical, operational, and organizational feasibility.
- Rank the proposed incentives and recommend the preferred and most appropriate one for implementation under the current conditions prevailing in South Africa.
- The proposals must include a detailed implementation plan with all resources identified and costing of all resources.
- A framework for the development of Energy Incentive Proposals.
- Include any other steps that the service provider deems necessary for a comprehensive development of new energy efficiency incentives.

3.2 Work package 2: Development of a Business Case for New Energy Efficiency Incentives

- Select one most preferred and feasible Proposal from the five developed under work package one.
- Develop a business case for the preferred new incentive.
- Calculate the costs associated with the new incentive in terms of financial and operational costs and any other costs that the service provider can identify for the new incentive.
- Estimate all necessary Organisational requirements for SANEDI to successful host and administer the new energy efficiency Incentive as an additional service

- Estimate the returns of introducing the new incentive and any other identified benefits.
- Include any other steps necessary for the development of a comprehensive Business Case for New Energy Efficiency Incentives for South Africa hosted at SANEDI.
- A business case template relevant for introducing new Energy Efficiency Incentives.

3.3 Work package 3: Project Management

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

- A representative(s) of SANEDI/12L Tax Incentive Sub-Programme.
- A representative(s) of the successful service provider.
- Other people may be invited by SANEDI as and when deemed appropriate.
- SANEDI shall chair the inception and project progress meetings.

The Steering Committee shall meet as follows:

- Inception Meeting – to initiate the Project and agree on specific details;
- Thereafter, progress meetings monthly.
- A final project 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 Meeting.
- Circulation of the minutes within five working days of the meeting for the purpose of receiving comments from meeting participants.
- Ensure minutes are updated after receiving comments and signed off by the Chairperson before convening the next monthly meeting.
- Bi-monthly Progress reports (Every *two months*) to be addressed at progress meetings.
- Bi-monthly Progress reports submitted at least three days before the progress meeting.

3.5 Expected Deliverables

- Project Inception Report.
- Monthly minutes 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 WP1: Proposals for New Energy Efficiency Incentives, containing the work package scope of work electronic copies (editable Word version and PDF print layout).
- Final report WP2: Business Case for New Energy Efficiency Incentives, containing the work package scope of work electronic copies (editable Word version and PDF print layout).

- Summary Presentations Deck with WP1 and WP2 scope of work
- Presentations to SANEDI, DEE and others as required.

4. Project Duration
Four Months

5. 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 proposals and business case was required. **N.B. Reference Letters: from different companies they worked with on similar projects. The letters must be on a company letterhead, dated and signed by the designated manager.**	5 = 5 or more reference letters 4 = 4 reference letters 3 = 3 reference letters 2 = 2 reference letters 1 = 1 reference letter 0 = 0 reference letter	25%		
2. **Team Lead Qualifications and Experience:** A detailed CV with team leader's qualifications and experience	5=master's degree in economics, Commerce or business administration with 10 years relevant experience. 4=honor's degree in economics, Commerce or business administration with 5 years relevant experience. 3=Degree in economics,	25%		

		commerce or business administration with 5 years' relevant experience. 2=diploma in economics, commerce or business administration with no years' experience. 1=matric qualification with relevant experience. 0=no relevant qualifications and no relevant experience			
	3. **Team Composition and Qualifications:** Detailed CVs with project team's qualifications and experience for at least two team members.	5=honors degree in economics, Commerce or business administration with 5 years relevant experience for at least two team members 4=bachelor's degree in economics, Commerce or business administration with 5 years relevant experience for at least two team members. 3=Diploma in economics, commerce or business administration with 5 years relevant experience for at	20%		

		least two team members. 2=diploma in economics, commerce or business administration with no years' experience for at least two team members. 1=matric qualification with relevant experience for at least two members. 0=no relevant qualifications and no relevant experience				
	4. Project Plan & Methodology: A detailed project plan and methodology is required showing the project implementation plan from inception to closure with clear milestones and deliverables. **N.B. A Gantt chart with required resources is a requirement to score full marks.**	5 = excellent, detailed project plan and methodology with clear milestones and deliverables from inception to closure. 4 = good, detailed project plan and methodology with clear milestones and deliverables from inception to closure. 3 = fair project plan and methodology with clear milestones and deliverables from inception to closure. 2 = Poor project plan and methodology. 1 = repetition of	30%			

		scope of work but no project plan. 0 = no project plan and methodology.			
	Threshold			**70%**	
	Total			**100%**	

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 first 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	R
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

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.

2 Joint venture or Consortium means an association of persons for the purpose

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 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

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of combining their expertise, property, capital, efforts, skill and knowledge in an activity for the execution of a contract.

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:

80/20 **or** **90/10**

$$Ps = 80\left(1 + \frac{Pt - P\,max}{P\,max}\right) \quad \text{or} \quad Ps = 90\left(1 + \frac{Pt - P\,max}{Pmax}\right)$$

Where

Ps = Points scored for price of tender under consideration

Pt = Price of tender under consideration

Pmin = 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 preferencepoint 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.

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