



NON-COMPULSORY BRIEFING SESSION

RFP 04/2026

THE APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF CUSTOMER INSIGHTS PLATFORM (INCLUDING CUSTOMER EXPERIENCE AND RESEARCH COMPONENTS) FOR A PERIOD OF THREE (3) YEARS.

TABLE OF CONTENTS

- **1. Welcome and Introduction**
- **2. Purpose, Procedures and Governance requirements**
- **3. Background and Business Requirement**
- **4. RFP Timelines**
- **5. Bid Evaluation Process**
- **6. Financial Analysis**
- **7. Service Agreement**
- **8. RFP submission and contact details**
- **9. Q&A**

TABLE OF CONTENTS

- 1. Welcome and Introduction
- **2. Purpose, Procedures and Governance requirements**
- 3. Background and Business Requirement
- 4. RFP Timelines
- 5. Bid Evaluation Process
- 6. Financial Analysis
- 7. Service Agreement
- 8. RFP submission and contact details
- 9. Q&A

2. PURPOSE

Non-Compulsory Briefing Session

- **Purpose**

- explain selected concepts, procedures and other aspects of the RFP
- confirm formal registration of Bidders for notices and other communications

- **It may contain**

- additional information
- additional rules that must be adhered to

- **It does not**

- cover every item in the RFP
- replace any of the issued RFP material
- change any of the RFP rules unless explicitly communicated in writing

- **The briefing session slides**

- The briefing session presentation may be uploaded on the SARS website and National Treasury (E-Tenders).

The RFP pack remains the primary source of information for the Bidder to respond.

2. PROCEDURES DURING BRIEFING SESSION

- **Questions during the session.**
 - SARS will take questions at the end presentation; however, bidders are requested to note their questions and subsequently email them through to: tenderoffice@sars.gov.za.
 - SARS will review and focus on most pertinent themes arising from the questions and provide answers where possible
 - All questions and answers may be uploaded on the SARS website and National Treasury (E-Tenders) website
 - The emailed answers will take precedence over any verbal response given in the briefing session
- **The session is being recorded**

TABLE OF CONTENTS

- 1. Welcome and Introduction
- 2. Purpose, Procedures and Governance requirements
- **3. Background and Business Requirement**
- 4. RFP Timelines
- 5. Bid Evaluation Process
- 6. Financial Analysis
- 7. Service Agreement
- 8. RFP submission and contact details
- 9. Q&A

3. BACKGROUND AND REQUIREMENT

- SARS has initiated a comprehensive procurement modernisation programme aimed at enhancing agility, leveraging advanced technologies, and improving overall competitiveness. The disruptions experienced during the Covid-19 pandemic in 2020 highlighted the critical need for robust, integrated procurement systems capable of supporting resilient and efficient operations. This modernisation initiative forms a key part of SARS's strategic objective to evolve into a smart, modern organisation that is recognised for its integrity, trust, and operational excellence.
- Currently, the procurement environment is characterised by two main solutions: one dedicated to strategic sourcing and the other to tactical purchasing. These systems function independently and lack full integration, resulting in operational inefficiencies and fragmented reporting.
- A unified platform is required to consolidate procurement processes, ensure compliance, enhance data integrity, and improve operational efficiency.

3. BACKGROUND AND REQUIREMENT

- ❖ While the existing platform has significantly enhanced SARS's ability to gather customer experience insights and conduct research, it presents several operational and strategic limitations. Key challenges lie in:
 - Manual processing of large volumes of qualitative data, which has introduced delays, inconsistencies, and constrained the generation of timely, actionable insights. This inefficiency has limited SARS's ability to personalize services, optimize resource deployment, and manage compliance in a responsive manner.
 - Fragmented use of separate modules also hinders the ability to link customer experience data with underlying strategic research related to perception, policy, or process-related issues, restricting the organization's capacity to generate deeper insights and coordinate interventions across the taxpayer journey.

3. BACKGROUND AND REQUIREMENT

- To address these limitations, SARS requires a next-generation Customer Insights Platform to replace its expiring solution and to address critical operational and strategic gaps. The platform should enable SARS to gauge the full customer and employee feedback lifecycle—from data collection to insight generation and service recovery. The platform should further enable automated, real-time data collection, AI-powered trends and sentiment analysis, and seamless integration with SARS systems to support data-driven decision-making, proactive service improvements, and taxpayer-centric compliance strategies.
- The solution should improve the efficiency and accuracy of data collection and analysis, positioning SARS as a data-driven, taxpayer-centric organization and facilitating a crucial shift from reactive to proactive service design and decision-making. This platform will also be utilized for SARS psychometric assessments for internal employee evaluation, focusing on behavioural traits, cognitive abilities, and alignment with organizational values, supporting talent management, development needs, employee engagement, and continuous improvement. The acquisition of this new platform is a key enabler for the modernization of SARS's systems and processes, leading to enhanced voluntary compliance, improved taxpayer experiences, stronger employee engagement, and increased operational efficiency.

**Presentation of BRS
by : Technical
Specialist**

TABLE OF CONTENTS

- 1. Welcome and Introduction
- 2. Purpose, Procedures and Governance requirements
- 3. Background and Business Requirement
- **4. RFP Timelines**
- 5. Bid Evaluation Process
- 6. Financial Analysis
- 7. Service Agreement
- 8. RFP submission and contact details
- 9. Q&A

RFP TIMELINES

ACTIVITY	DUE DATE AND TIME
Bid advertisement	12 June 2026
Non-compulsory briefing session	19 June 2026 @ 11:00am - 2:00pm
Bidders to submit written questions on or before	From 12 June 2026 – 25 June 2026 @ 4:00pm
SARS to respond to bidder's written questions on or before:	26 June 2026
Closing date and Time	06 JULY 2026 @ 11:00am
Notice to bidders	End of September 2026

Any enquiries must be referred, in writing via email: tenderoffice@sars.gov.za

TABLE OF CONTENTS

- 1. Welcome and Introduction
- 2. Purpose, Procedures and Governance requirements
- 3. Background and Business Requirement
- 4. RFP Timelines
- **5. Bid Evaluation Process**
- 6. Financial Analysis
- 7. Service Agreement
- 8. RFP submission and contact details
- 9. Q&A

5. BID EVALUATION PROCESS

Gate 0

Pre-Qualification



- Invitation to Bid –SBD 1
- Declaration of Interest (SBD 4)
- Preference Point Claim Form – SBD 6.1
- Central Registration Report (Central Database System) from NT
- General Conditions of Contract (GCC)
- SARS Data Protection Agreement
- Annual Financial Statements



SARS Main RFP Document

Gate 1

Technical Evaluation Process



- See Section 7.3 of the RFP Main Document (Technical Evaluation Process)
- Achieve overall score of **66.67** points out of 100 points to proceed to Gate 2



SARS Main RFP Document

5. BID EVALUATION PROCESS, continued...

Gate 2

Price and Specific Goals Evaluation

Price = 80

Specific Goals = 20



- Supporting documents for specific goals evaluation covered in slide 17
- SARS RFP 04/2026 : Price Response Template



RFP 04-2026 -
Pricing Template

Gate 3



The points scored by a bidder for the price evaluation and the B-BBEE/specific goals evaluation will be added together to determine the overall points a bidder's tender will score out of 100 points

5. BID EVALUATION PROCESS - GATE 2: PRICING

The Price and Specific goals points will be added together to determine each bidder's overall score out of 100 points.

Stage 1: Price Evaluation (80 points)

Adjudication Criteria	Points
Evaluation Criteria	80



RFP 04-2026 -
Pricing Template

$$P_s = 80 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$$

- P_s = Points scored for price of Bid under consideration
- P_t = Rand value of Bid under consideration
- P_{min} = Rand value of lowest acceptable Bid

5. BID EVALUATION PROCESS - GATE 2: SPECIFIC GOALS

Stage 2: Specific Goals Evaluation (20/10 points)

Adjudication Criteria	Points
Specific goal Evaluation	20

PRICE & B-BBEE	POINTS
Price	80
Specific Goals	20
Total points for Price and B-BBEE Specific Goals	100

Presentation :
B-BBEE
Specialist



RFP 04-2026 -
SBD 6.1

Points for the B-BBEE/specific goals evaluation will be allocated in accordance with a bidder's ownership status as per SBD 6.1 Preference points claim form. Points for specific goals can only be awarded to a bidder who submits a valid B-BBEE certificate or sworn affidavit together with the SBD 6.1 Preference points claim form.

5. SPECIFIC GOALS

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Evidence Required
An EME (Exempted Micro Enterprise)/QSE (Qualifying Small Enterprise) with at least 51% Black Ownership.	8	B-BBEE Certificate / B-BBEE Sworn Affidavit (In case of a Joint Venture (JV), a consolidated scorecard will be accepted).
An entity with at least 30% Black Women Ownership	5	
An entity with at least 51% Black Youth Ownership	5	
<p>An entity that subcontracts a minimum of 30% of the contract value to an Exempted Micro Enterprise (EME) or Qualifying Small Enterprise (QSE) that is at least 51% black owned;</p> <p style="text-align: center;">OR</p> <p>An entity that is an Exempted Micro Enterprise (EME) or Qualifying Small Enterprise (QSE) that is at least 51% black owned and with ownership by persons with Disability.*</p>	2	B-BBEE Certificates / Sworn Affidavits for both bidding entities, together with a signed (Memorandum of Understanding) MoU or preliminary subcontracting agreement confirming the arrangement.

5. REQUIREMENTS FOR SPECIFIC GOALS

- ❖ Points for specific goals can only be awarded to a bidder who submits a valid B-BBEE certificate or sworn affidavit together with the SBD 6.1 Preference points claim form.
- ❖ Bidders **MUST** complete and sign the SBD 6.1 form to claim the Bidder's B-BBEE preference points
- ❖ Bidders who do not claim preference points may be scored zero for Specific goals.
- ❖ The B-BBEE certificate or sworn affidavit should be submitted in the name of the bidding entity.
- ❖ Entities who are in a holding and subsidiary relationships must submit a list / annexure of the B-BBEE certificate indicating the subsidiaries to the holding company
- ❖ Incorporated JVs or Consortiums must submit the B-BBEE certificate or affidavit of the entity. Unincorporated JVs must submit a consolidated B-BBEE certificate as if they were a group structure for every separate bid
- ❖ JVs or Consortiums are also required to submit signed JV or Consortium agreement

5. SPECIFIC GOALS POINTS ALLOCATION AND EVIDENCE

No.	Classification	Turnover	Submission requirement
1.	Exempted Micro Enterprise (EME)	Below R10 million p.a.	<ul style="list-style-type: none">• A sworn affidavit or B-BBEE certificate from CIPC.
2.	Qualifying Small Enterprise (QSE)	Above R10 million up to R50 million p.a.	<ul style="list-style-type: none">• A sworn affidavit for entities with 51% Black Ownership and above; or• A copy of B-BBEE Rating Certificate from a SANAS accredited rating agency for entities with 50% and less black ownership.
3.	Large Enterprise (LE)	Above R50 million p.a.	<ul style="list-style-type: none">• A copy of B-BBEE Rating Certificate from a SANAS accredited rating agency.

5. VALID B-BBEE SWORN AFFIDAVITS

- ❖ The Department of Trade, Industry and Competition (the DTIC) has designed sworn affidavit templates and qualifying measured entities must use these templates.
- ❖ Affidavits must be sworn or affirmed before a person authorized to administer the oath or take the affirmation.
- ❖ Name/s of deponent as they appear in the identity document and the identity number must be completed.
- ❖ Designation of the deponent as either the director, owner or member must be indicated in order to know that the person deposing to the sworn affidavit is duly authorised.
- ❖ The affidavit must be based on the most recent financial year (latest finalised set of financial statements)
- ❖ Financial statements that are older than 18 months from the date of signatures are considered outdated and non compliant.
- ❖ The date on the affidavit is the date on which the deponent is saying that the information stated in the affidavit is true.
- ❖ The signature of the deponent and the Commissioner of Oaths must be on the same day.
- ❖ The deponent must then sign the affidavit in the presence of Commissioner of Oaths.
- ❖ The Commissioner must give their details on the affidavit.(Usually the commissioner stamp and signature)
- ❖ **SARS reserves the right to request that bidders submit their Black ownership and turnover information in support of their Affidavits.**

TABLE OF CONTENTS

- 1. Welcome and Introduction
- 2. Purpose, Procedures and Governance requirements
- 3. Background and Business Requirement
- 4. RFP Timelines
- 5. Bid Evaluation Process
- **6. Financial Analysis**
- 7. Service Agreement
- 8. RFP submission and contact details
- 9. Q&A

6. FINANCIAL ANALYSIS EVALUATION

- Bidders are required to submit the public interest score and complete sets of audited / independently reviewed annual financial statements in compliance with the Companies Act for the three (3) most recent financial periods in the name of the bidding entity. The financial statement analysis will be conducted on the shortlisted bidders.
- **The annual financial statements must contain:**
 - Statement of Profit and Loss and Other Comprehensive Income;
 - Statement of Financial Position;
 - Statement of Cash Flows;
 - Statement of changes in equity/ net assets ; and
 - Accompanying Notes.
- **Entities which are trading for less than three (3) financial periods must provide:**
 - A letter detailing that fact, signed by a duly authorised representative of the entity;
 - The annual financial statements that the entity is able to provide, taking into account the period that it has been trading; and
 - Any other information or documentation which would provide more clarity on the financial history of the bidder.

6. FINANCIAL ANALYSIS EVALUATION

In the event of the bid being in the form of a Joint Venture (JV), the following is required:

- Annual financial statements of the JV for a registered JV and for unincorporated JV annual financial statements of each company;
- A JV legal agreement detailing the percentage ownership of each entity; and
- A consolidated B-BBEE Certificate.
- If the bidder cannot provide the preceding year's audited / independently reviewed financial statements as part of its bid submission, the bidder should submit draft annual financial statements or its latest management accounts, together with the three (3) most recent years audited / independently reviewed annual financial statements.
- **SARS reserves the right to request further information with regards to the annual financial statements of a bidder at a later stage.**

TABLE OF CONTENTS

- 1. Welcome and Introduction
- 2. Purpose, Procedures and Governance requirements
- 3. Background and Business Requirement
- 4. RFP Timelines
- 5. Bid Evaluation Process
- 6. Financial Analysis
- **7. Service Agreement**
- 8. RFP submission and contact details
- 9. Q&A

7. SERVICE AGREEMENTS

- The tender pack included the General Conditions of the Contract (GCC)
- As per main RFP the document must be initialed and returned with the bid submission.

TABLE OF CONTENTS

- 1. Welcome and Introduction
- 2. Purpose, Procedures and Governance requirements
- 3. Background and Business Requirement
- 4. RFP Timelines
- 5. Bid Evaluation Process
- 6. Financial Analysis
- 7. Service Agreement
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8. RFP SUBMISSION AND CONTACT DETAILS: FILE 1: ORIGINAL

- **Exhibit 1**

Pre-qualification documents

Section 1

- Pre-qualification documents (SBD documents)

Section 2

- Technical Evaluation Responses
- 3 years audited /reviewed Financial statements

Section 3

- Company profile
- Supplementary information

Section 4

- Signed / initialled GCC
- Signed / initialled Data Protection Agreement



FILE 2: ORIGINAL

Exhibit 1

Pricing Template



Exhibit 2

- B-BBEE Certificate/ Sworn Affidavit
- SBD 6.1



- Please ensure that every file is clearly labelled with the name of the bidder and organised for easy access during the evaluation process. Furthermore, the USB should also display the bidder's name prominently.

RFP SUBMISSION AND CONTACT DETAILS

Bidders must submit two files (File 1 & 2) and a USB with content of each file by **06 July 2026 at 11:00 am**

Bid documents will only be considered if received by SARS before and on the Closing Date and time.

1

Technical File



+

2

Price & Specific Goals



+



Content of File 1 and 2

TENDER BOX

Tender Office SARS Procurement, Lehae La SARS
Head Office, 299 Bronkhorst Street Nieuw
Muckleneuk, Pretoria

Physical
submission

Any enquiries must be referred, in writing via email: tenderoffice@sars.gov.za

TABLE OF CONTENTS

- 1. Welcome and Introduction
- 2. Purpose, Procedures and Governance requirements
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- 4. RFP Timelines
- 5. Bid Evaluation Process
- 6. Financial Analysis
- 7. Service Agreement
- 8. RFP submission and contact details
- 9. Q&A

QUESTIONS & ANSWERS



Thank you
Siyabulela
Siyabonga
Siyathokoza
Dankie
Re a leboga
Re a leboha
Ro livhuwa
Ha khensa