South African Revenue Service

RFP 02/2026

APPOINTMENT OF A SUPPLIER FOR THE PROVISION OF END-USER DEVICE SUPPORT SERVICES (TOWER E) FOR A PERIOD OF FIVE (5) YEARS.

BUSINESS REQUIREMENTS SPECIFICATION (BRS)

© South African Revenue Service 2026

South African Revenue Service

Contents

1 USAGE OF TERMS IN THIS DOCUMENT 7
1.1 References to other Documents in the RFP Pack 7
1.2 Glossary Table 7
1.3 Mandatory and Directory Requirements 8
2 BACKGROUND 8
3 COMPONENTS OF SCOPE 9
3.1 Tower E: End-user Device Hardware Support Services 9
4 USE OF ALTERNATE TECHNOLOGIES OR PROCESSES DURING THE TERM 9
5 UNDERLYING PRINCIPLES TO THE SERVICES 9
5.1 Accountability 10
5.2 Non-exclusivity 10
5.3 Flexibility 10
5.4 Technical 10
5.5 Compliance 11
5.6 Performance Standards 11
5.7 Service Levels and Service Coverage Periods 11
5.8 Specification of Service Coverage Period and Service Level for a Device 12
5.9 Change of Service Coverage Period and Service Level 12
5.10 Special conditions relating to WFH Service Coverage Period 13
5.11 Measurement and Reporting of Service Levels 13
5.12 Request to Expedite Repair or Service 13
5.13 OEM Relationship 14
5.14 Mandatory Information Security Requirements 14
a. Information Security Governance 14
b. Data Protection and Data Sanitisation 14
c. Endpoint Security and Configuration Baselines 15
d. Logging, Monitoring and SOC Integration 15
e. Incident Response and Forensic Readiness 15
f. Warehousing, Logistics and Physical Security 16
g. Personnel Security and Vetting 16
h. Subcontractor Security Obligations 16
i. Audit, Assurance and Compliance 16
j. Identity, Authentication and Privileged Access 17
6 COMMON SERVICE DEFINITIONS AND REQUIREMENTS 17
6.1 Service Management 17
6.2 Device-based Services 20
6.3 Service Descriptions 20
6.4 General obligations applicable to all Device-based Services 20

© South African Revenue Service 2026

South African Revenue Service

6.5 General housekeeping activities 20
6.6 Break-fix Service Descriptions 21
6.7 Break-fix services required for devices under warranty 21
6.8 Break-fix Services Required for Devices not Under Warranty 22
6.9 Break-fix Services for Devices that Require only the Facilitation of Repair (Exclude actual repair activities).22
6.10 Break-fix Services that Qualify for Permanent Replacement 22
6.11 WUS Services 23
6.12 Summary of Break-fix Services and Related Process Flows 23
6.13 Standard Chargeable Services 23
6.14 Miscellaneous Services 25
6.15 Service Provider Management Personnel 27
6.16 Project Support 28
6.17 Consulting 28
6.18 Training 28
6.19 Administration 29
7 RESEARCH AND DEVELOPMENT 29
7.1 Tower E: End-user Device Support Services 29
7.2 Flexible Support Services 29
7.2.1 Adaptive Service Delivery 30
7.2.2 Proactive Technology Support 30
7.2.3 Scalable Support Model 30
7.2.4 Agility in Service Implementation 30
7.2.5 Collaborative Approach 30
8 WAREHOUSING AND REVERSE LOGISTICS 30
8.1 Warehouse Management Portal 31
9 TRANSITION PROCESS (COMMON REQUIREMENTS) 32
9.1 Transition Plan 32
9.2 Experienced Transition team 33
10 TOWER E: END-USER DEVICE SUPPORT SERVICES 33
10.1 Scope 33
10.2 Delivery Model 34
10.3 Transition 34
10.4 Device-based Services applicable to Tower E 35
10.5 Service Coverage Periods and Service Levels applicable in Tower E 39
10.6 Volume Based IMACD 40
10.7 Service Provider Technical Personnel 41
10.8 Professional Services Scope of Services 42
10.9 Transition of Services 42
ATTACHMENT A: PROCESS FLOW DIAGRAMS 42
1 IN-WARRANTY BREAK-FIX PROCESS (WUS APPLICABLE) 43

© South African Revenue Service 2026

Diagram 1.1 Break Fix (in warranty) 43
2 IN-WARRANTY BREAK-FIX PROCESS (WUS NOT APPLICABLE) 44
Diagram 2.1 Break Fix (in-warranty) 44
3 OUT-OF-WARRANTY BREAK-FIX PROCESS (WUS APPLICABLE) 45
Diagram 3.1 Break Fix (out of warranty) 45
4 SWAP-OUT REPAIR PROCESS 46
Diagram 4.1 Swop-Out Repair Process 46
5 SERVICE-ONLY – TIME AND MATERIAL PROCESS (WUS APPLICABLE) 47
Diagram 5.1 Service Only Time and Material (out of warranty) 47
6 SERVICE-ONLY–TIME AND MATERIAL PROCESS (WUS NOT APPLICABLE) 48
Diagram 6.1 Service Only Time and Material (out of warranty) 48
7 SERVICE PROVIDER-PROVIDED WUS PROCESS 49
Diagram 7.1 Service Provider (WUS) 49
8 SARS-PROVIDED WUS PROCESS 50
Diagram 8.1 SARS Provided WUS Process 50
9 PRE-PRODUCTION PREPARATION/STAGING PROCESS 51
Diagram 9.1 Pre-Prod Preparation/ Staging 51
10 INSTALLATION/REPLACE PROCESS 52
Diagram 10.1 Installation/Replacement Process 52
11 MOVE PROCESS 53
Diagram 11.1 Move Process 53
12 ADD/CHANGE PROCESS 54
Diagram 12.1 Add/Change 54
13 DECOMMISSIONING FOR RE-USE PROCESS 55
Diagram 13.1 Decommissioning for re-use process 55
14 DECOMMISSIONING FOR DISPOSAL PROCESS 56
Diagram 14.1 Service Only Time and Material (out of warranty) 56
15 REPAIR PROCESS 57
Diagram 15.1 Repair Process (end-user devices: in-warranty only) 57
16 INSTALL SERVICE PROVIDER-PROVIDED CONSUMABLE PROCESS 58
Diagram 16.1 Install Service Provider- Provided Consumables 58
17 INSTALL SARS-PROVIDED CONSUMABLES PROCESS 59
Diagram 17.1 Install SARS-provided consumables process 59
18 DELIVERYACCEPTANCE TEST 60
Diagram 18.1 Delivery Acceptance Test 60
19 WAREHOUSE MANAGEMENT PROCESS 61
Diagram 19.1 Warehouse Management Process 61
20 REVERSE LOGISTICS PROCESS 62
Diagram 20.1 Reverse Logistics Process 62

© South African Revenue Service 2026

South African Revenue Service

RFP02/2026

BUSINESS REQUIREMENTS SPECIFICATION

This document forms part of the RFP 02/2026 pack. It sets out the business requirements that SARS has for End-User Device Support Services. This document and its attachments must be read in conjunction with all other documents in the RFP Pack as they may contain further requirements that must be considered by the Bidder in compiling a Proposal. The Bidder is referred, in particular, but without limitation to the following documents in the RFP Pack:

- Main RFP Document;
- Master Services Agreement End-user Device Support Services;
- Tower E Site Classifications;
- Tower E End-user Device Categories and Quantities and Devices per site

The *Master Services Agreement End-user Device Support Services* sets out the provisions of the agreement under which SARS intends contracting with the successful Bidder(s). The *Master Services Agreement End-user Device Support Services* contains the contractual provisions for Tower E. While the Bidder is required to respond to the entire *Master Services Agreement End-user Device Support Services*, of particular relevance to this *Business Requirements Specification* are the following Schedules and Appendices which must be read in conjunction with this document:

- Schedule B (Service Management Services SOW)
- Schedule B-E (End-user Device Support Services SOW)
- Schedule C (Service Levels)
- Appendix C-E-1 (End-user Device Support Services Service Levels) and Appendix C-E-2 (End-user Device Support Services Allocations of Weighting Factor Points as of the Effective Date).

© South African Revenue Service 2026

South African Revenue Service

1 USAGE OF TERMS IN THIS DOCUMENT

1.1 References to other Documents in the RFP Pack

Underlined and italicised names are references to (or short names of) other documents in the RFP Pack. The Bidder must refer to paragraph 4 of the *Main RFP Document* for the table of documents and their short names.

1.2 Glossary Table

The capitalised terms in this document appearing in the glossary table below will have their corresponding meanings:

Term	Meaning
CSIRT	Computer Security Incident Response Team
CMDB	Configuration Management Database
Device-based Services	Services relevant in the context of a device, including break-fix services in the event of a device not functioning according to specification and services provided on request, such as the install, move, add, change or decommission of a device.
End-User Device	PCs, laptops, tablets, smart phones, printers, scanners and other hardware that end-users use to provide input to receive output from and generally interact with IT applications and services.
Expedited Service Request	See the definition in paragraph 5.12
In-warranty	Refers to the status of a device that is under manufacturer warranty
OEM	The original equipment manufacturer
Out-of-support	Refers to the status of a device that is no longer supported by the OEM. I.e. the OEM no longer manufactures spare parts; issues fixes for; or otherwise provide any support for the device.
Out-of-warranty	Refers to the status of a device that is not under manufacturer warranty.
SARS PPS&G	SARS Policies, Procedures, Standards and Guidelines
SARS Service Management System	The BMC Remedy system used for the management of SARS' service management processes
SD Card	Secure Digital Card
Seat	Open-plan office space on a SARS site containing a desk, chair and network connection point
Service Coverage Period	See the definition in paragraph 5.7
Service Level	See the definition in paragraph 5.7
Service-only	A type of service in which the Service Provider is required to facilitate the restoration of services and in which a third party may perform the actual repair of the device and for which SARS is responsible for the costs of such a third party. See paragraph 6.9
Services	The services to be delivered by the Service Provider as set out in clause 4 of the *Master Services Agreement End-user Device Support Services.*
Site Classification	See definition in paragraph 5.7
SOW	Statement of Work
SOC	Security Operation Centre
SP	Service Provider

© South African Revenue Service 2026

Term	Meaning
Standard Chargeable Services	Defined packages of work that are performed by the Service Provider on request by SARS at a fixed rate per request. For example: the installation of a computing device. The Standard Chargeable Services are set out in paragraph 6.13
Swap-out	Means the activity of permanently replacing a non-functioning device with a functioning device. See paragraph 6.10
UTR or Uneconomical to Repair	This term is applicable to the handling of certain repairs to out-of-warranty devices for which the Service Provider is obligated to repair for a monthly charge. See paragraph 6.8
WFH	Work from Home
WUS or Whole Unit Spare	An entire functioning device to replace a non-functioning device temporarily, while the non-functioning device is being repaired or replaced. The device must deliver at least the same functionality as the non-functioning device

1.3 Mandatory and Directory Requirements

Bidders are advised to read the business requirements as set out in this document with care. Where SARS has specified a mandatory requirement, (i.e., where the business requirement, by the context; presence of verbs such as 'must'; 'will'; 'shall' etc.; or explicit instruction indicating that it is mandatory), the Bidder must build and price its solution accordingly.

Directory requirements (i.e., where the business requirement, by the context; presence of verbs such as 'may; 'should; 'can' etc.; or explicit instruction indicating that they are directory) are requirements that SARS does not regard as mandatory.

2 BACKGROUND

To achieve SARS's Vision of a smart, modern SARS with unquestionable integrity that is trusted and admired is of paramount importance. Pivotal to the delivery of SARS' vision are our digital platforms and technology infrastructure. To foster Strategic Objective 9, of building public trust and confidence, our technology assets must demonstrate the highest levels of robustness and security. In support of this, the mandate is executed, among others, through partnering with third-party suppliers to provide services and products to enable achievement of organisational objectives.

This tender for the Tower Infrastructure contracts for Tower E is aligned with several of SARS's Strategic Objectives, including:

- Objective 1: Clarity and certainty for taxpayers and traders of their obligations;
- Objective 2: Make it easy for taxpayers and traders to comply with their obligations;
- Objective 6: Modernise our systems to provide Digital and Streamlined services; and
- Objective 5: Increase and expand the use of Data within a comprehensive knowledge management framework to ensure integrity, drive insight and improve outcomes.

The primary objective of this RFP is to ensure the continuity and cost-effectiveness of SARS's End-User Device Support Services. SARS's objectives in issuing this RFP do not include a transformation of the technologies or services related to the support of SARS's end-user devices. However, during the anticipated Term of the *Master*

Services Agreement End-user Device Support Services, developments in End-user Device technologies, including technologies to manage such environments, require that SARS maintains a flexible approach in contracting Service Provider(s) to ensure that it can take advantage of these developments and ensure the support methods and processes keep abreast of developments in this field.

The landscape of end-user devices is constantly evolving and as SARS maintains its efforts to modernise its systems, a changing mix of devices, brands and models are anticipated to be introduced during the Term of the *Master Services Agreement End-user Device Support Services.* It will, therefore, be expected of the Service Provider(s) to support a wide and evolving range of end-user devices as and when SARS may introduce them into the SARS configuration, although the award of a contract in the Tower does not confer the right of exclusivity to provide support services for new devices.

3 COMPONENTS OF SCOPE

3.1 Tower E: End-user Device Hardware Support Services

Scope for the support includes all categories of devices listed in Table E-1, recurring support activities defined in Section 6.2, asset reconciliation, end-user support via multi-channel help desk (phone, email, chat), maintenance of the CMDB, spares management (see "Spare Parts & Warranty Management" below), onsite hardware support interventions, call logging and closure, and incident/problem/change management participation. Out of scope are activities such as network engineering, server administration, and support for end user devices not recorded in the CMDB until they are discovered and added via an approved SARS process

4 USE OF ALTERNATE TECHNOLOGIES OR PROCESSES DURING THE TERM

In defining the scope of the Tower, reference is made to technologies and/or specific processes currently deployed within the SARS environment. Where a technology or process has been specified in this *Business Requirements Specification* the Bidder's Proposal must be designed to comply with the specific technology and/or process.

During the Term of any agreement arising from the award of this RFP, the use of alternative technologies and/or processes may be proposed by the Service Provider and/or requested by SARS and their implementation will not be considered out of scope of the award, provided that they effectively substitute, or supplement technologies/processes contained in the Service Provider's original Proposal. Alternative technologies or processes may be proposed by the Service Provider during the Term. SARS will evaluate any such proposal against the objective criteria in Schedule E (security, interoperability, best practice, cost and performance). SARS must provide a written approval or written rejection within 90 calendar days of receiving the proposal. A proposal will only be considered approved once SARS has issued written confirmation. If SARS issues a written rejection, the Service Provider must continue with the originally specified technology or withdraw the proposal. No alternative technologies/processes may be implemented during the Term without SARS' approval.

5 UNDERLYING PRINCIPLES TO THE SERVICES

The principles detailed in this paragraph apply to the Services to be delivered in Tower E.

5.1 Accountability

SARS requires a single, accountable Service Provider for the Services to be delivered to the Tower. The Service Provider must engage all subcontractors on a formal contractual basis and must ensure adherence to the conditions placed on subcontractors as required by SARS. To ensure sufficient control is retained by the Service Provider, the Service Provider is limited to subcontracting no more than 40% (forty percent) of the business, by value of contract.

© South African Revenue Service 2026

For further details on the conditions attached to the Service Provider's use of subcontractors, see paragraph 8 of the *Main RFP Document*. The prime bidder remains fully accountable for all subcontractor performance and must include in its Proposal a schedule listing all subcontractors and the scope they will cover.

The Service Provider in the Tower must supply all elements of the Services to SARS in the Service Provider's name. The Bidder must not propose a solution in any part of its Proposal that is contingent on SARS granting the Bidder an agency for it to procure elements of the solution from a third party in SARS's name.

5.2 **Non-Exclusivity**

SARS intends to contract for the different areas of scope with a Service Provider on the basis that certain of the Services (or categories of such equipment or equipment located in certain locations) may be excluded from the scope.

SARS will retain the right to source any part of the scope of Services from other Service Providers during the Term or to provide such part of the scope of Services itself.

5.3 **Flexibility**

During the Term of the agreement SARS anticipates that it will change the landscape of its infrastructure and configuration and the requirements for the support thereof. SARS, therefore, retains the right to adapt the scope of equipment and processes to its changing requirements including the right to:

- Include new categories and/or exclude current categories of equipment, with regards to new categories the Service Provider will be given 90 (ninety) days' notice to enable the new category;
- Include new manufacturers/brands/models and/or exclude current manufacturers/brands/models of equipment;
- Increase or reduce the quantities of equipment under support;
- Introduce equipment at new sites into the scope of support or exclude equipment at existing sites from the scope of support; and
- Include or exclude existing or new sites from the scope of services.

Therefore, a Bidder must be prepared to contract to provide support services on a flexible basis to accommodate SARS's changing needs and requirements for support of changing technologies.

5.4 **Technical**

SARS has no specific or immediate requirement to undertake a major technical transformation in terms of the technology or processes as part of the Services in this Tower. If SARS undertakes a transformation of technology or process within the scope of this Tower during the Term, the Service Provider appointed to such Tower may be engaged, on a project basis, to provide services supporting the transformation. For clarity, while a yearly percentage of refresh of equipment is undertaken by SARS on a continuous basis, this is not considered a technical transformation.

5.5 **Compliance**

The Service Provider is required to execute the processes, procedures, schedules and work practices developed in accordance with the *Master Services Agreement End-user Device Support Services.* Throughout the Term of the agreement, the Service Provider will be required to improve and modify these processes, procedures, schedules and work practices as required by SARS.

© South African Revenue Service 2026

The bidder must note the obligation to adhere to SARS PPS&G in the *Master Services Agreement End-user Device Support Services*.

5.6 **Performance Standards**

It is of critical importance to SARS that the Service Provider provides the Services to meet or exceed the Service Levels specified in Schedule C (Service Levels) of the *Master Services Agreement End-user Device Support Services* and its Appendices. The Service Provider will be required to measure, monitor and report upon the delivery of the Services against the Service Levels. The Service Provider must draw performance-related information from the SARS Service Management System to construct and produce the required monthly reports on Service Level achievements. The information to be presented in the report and the format of the report will initially be agreed upon between the Service Provider and SARS during Transition and will be continuously improved during the Term. The Service Level requirements are set out at a high level with explanatory notes in this document but must be read together with Schedule C (Service Levels) of the *Master Services Agreement End-user Device Support Services.*

The Bidder's attention is drawn to the Service Level Targets and the provisions of Schedule C (Service Levels) of the *Master Services Agreement End-user Device Support Services* regarding Service Level Credits.

SARS will assign a Site Classification (Metro, Town or Rural) to each SARS Site. The Bidder must consult *SARS Site Classifications (per Tower E)* to obtain the Site Classification that will be associated with each SARS site at the Effective Date. The Site Classification will be one of the factors determining the price of support for devices at a SARS Site.

5.7 **Service Levels and Service Coverage Periods**

The definition of the performance standards applicable to a device category is specified with respect to two dimensions: Service Coverage Period and Service Level.

"**Service Coverage Period**" relates to the hours of service applicable to a device that will be one of WFH, Basic, Standard, Extended or Premium.

"**Service Level**" relates to the time within which the Service Provider must respond and repair the device. The Service Level is specified by a Service Level Class (Bronze, Silver, Gold or Platinum) which describes the repair time applicable to a device (and may, in certain cases, be specified in terms of response time).

SARS requires the Bidder to quote a monthly rate for every applicable device-based service for every combination of Site Classification (Metro, Town or Rural); Service Coverage Period (WFH, Basic, Standard, Extended and Premium) and Service Level (Bronze, Silver, Gold or Platinum) for every device type.

The definitions of Bronze, Silver, Gold or Platinum and the definitions of WFH, Basic, Standard, Extended and Premium are set out under the *service descriptions paragraph 6.3* of this document, respectively.

5.8 **Specification of Service Coverage Period and Service Level for a Device**

Each SARS Site has been assigned a Service Level and Service Coverage Period that applies to all devices in the Tower that are registered to that SARS Site. At the Commencement Date, the Service Level and Service Coverage Period assigned to a site for the Tower will be as specified in *SARS Site Classifications (per Tower E)*. SARS may change the Service Level and Service Coverage Period assigned to a SARS Site during the Term with 60 (sixty) days' notice.

© South African Revenue Service 2026

If support is required for a mobile device (such as a laptop), which has been moved from the site at which it is registered, then the Service Provider must still provide support for the device at the SARS site to which it has been moved, subject to the following:

- The shorter of the Service Coverage Periods between the SARS site to which the device is registered and the SARS site to which the device has been moved will apply.
- The least stringent of the Service Levels between the SARS site at which the device is registered and the SARS site to which the device has been moved will apply.
- For example: A laptop registered at Beit Bridge has a Service Coverage Period of "Standard" and a Service Level of "Silver". The laptop is moved to Lehae la SARS in Brooklyn, which has a Service Coverage Period of "Premium" and a Service Level of "Bronze". The Service Coverage Period and the Service Level applied to the device will be "Standard" and "Bronze", respectively, although SARS is being charged for a "Standard" and "Silver" service for the device. This example is set out on the table below.

Table 1: Service Coverage Period of Standard and a Service Level of Silver

Service Coverage Period	Site at which the Device is registered	Site where the Device is physically	Applicable Service Level
Service Coverage Period	Standard	Premium	Standard
Service Level Class	Silver	Bronze	Bronze

(Note that the values for Service Coverage Period and Service Levels in the example above are for illustrative purposes only and the Bidder must consult *SARS Site Classifications (per Tower E)* for the actual Service Coverage Periods and Service Levels that are specified for each SARS site).

5.9 **Change of Service Coverage Period and Service Level**

The Bidder must provide rates for all combinations of Site Classification, Service Coverage Period and Service Level requested for all categories of devices. SARS may, during the Term, with 60 (sixty) days' notice, change the Service Level and/or Service Coverage Period that applies to a SARS site. The rates associated with the new Service Level and Service Coverage Period must be charged from the day the new Service Level and Service Coverage Period come into effect.

5.10 **Special conditions relating to WFH Service Coverage Period**

The WFH Service Coverage Period may only be assigned to a SARS owned or rental device used by a SARS end-user classified as a WFH user.

SARS may not assign a WFH Service Coverage Period to a SARS device unless SARS has completed the necessary verifications that the end-user in question is in fact a WFH user.

5.11 **Measurement and Reporting of Service Levels**

The Service Provider must produce monthly Service Level reports in accordance with Schedule C (Service Levels) of the *Master Services Agreement End-user Device Support Services*. In this regard, the Service Provider must produce the reports using data from the SARS Service Management System. The method of obtaining the data from SARS Service Management System must be determined and processes defined as part of the Transition project.

5.12 **Request to Expedite Repair or Service**

Regardless of the Service Coverage Period associated with a device, SARS may request that the Service Provider attends to the repair or service of a specific device outside the Service Coverage Period attached to the device. This service request is known as an "**Expedited Service Request**". The bidder is required to provide a fixed rate, which is chargeable with every Expedited Service Request that SARS makes. This fixed rate is only related to the elements of costs of expediting the services and must not include any costs related to the repair or service that already forms part of another rate/charge associated with the repair or service.

An Expedited Service Request will be initiated by a request from an approved member of SARS personnel to the Service Provider. During Transition, SARS will confirm the names of the SARS personnel that may approve an Expedited Service Request. On receipt of a request from SARS, the Service Provider must offer SARS a committed time of arrival at the site and/or a committed time to repair. SARS may accept or reject such offer provided by the Service Provider. If SARS accepts the Expedited Service Request offer, the Service Provider will provide the expedited services at the associated Expedited Service Request rate.

If the Service Provider does not meet the committed time of arrival on site and/or the committed time to repair after acceptance by SARS of the offer, no part of the Expedited Service Request rate is payable by SARS. The acceptance or rejection of the Service Provider's offer by SARS will in no way relax the base Service Level already applicable to the device(s).

The Service Provider must provide a monthly report detailing the Expedited Service Requests attended to during the preceding month. The Service Provider must analyse the Expedited Service Requests and include recommendations for ways to reduce the number of Expedited Service Requests in the monthly report.

5.13 **OEM Relationship**

The Service Provider must have a back-to-back agreement in place with the applicable Original Equipment Manufacturers (OEMs) or their official representatives for all equipment covered under the contract. Specifically, for endpoint devices such as laptops, desktops, and all-in-ones, the required OEMs are Apple, Dell, Lenovo, and HP. For printers, the Service Provider must have agreements in place with HP and Ricoh. SARS requires the Service Provider to have these back-to-back agreements with the specified OEMs in place by the Commencement Date. If, on annual OEM renewals, the Service Provider fails to meet these obligations, the penalty set forth under Common Service Schedule C (Service Levels) of the Master Services Agreement End-user Device Support Services will apply.

The Service Provider must ensure that the back-to-back agreement for all services remains effective throughout the Term of the *Master Services Agreement End-user Device Support Services*.

During the Term of the agreement, SARS may elect to change the equipment/brands currently used within SARS or introduce new equipment from a new manufacturer. The Service Provider must be prepared to enter into new/additional back-to-back agreements with OEMs (or their official representatives) to accommodate SARS's requirement for support for the newly introduced equipment/brands.

© South African Revenue Service 2026

5.14 **Mandatory Information Security Requirements**

a. **Information Security Governance**

- The Service Provider must implement, maintain, and enforce an Information Security Management System (ISMS) aligned to ISO/IEC 27001 for the full duration of the contract.
- The Service Provider must provide evidence of ISO/IEC 27001 certification, or a SARS-approved equivalent, covering:
  - End-user device support services
  - Warehousing and reverse logistics
  - Remote support operations
  - Third-party and subcontractor management
- The ISMS must extend to all subcontractors, suppliers, and third parties engaged in delivering any portion of the Services.

b. **Data Protection and Data Sanitisation**

- No SARS data may be exposed, copied, or retained outside SARS-approved systems and locations.
- All devices permanently removed from SARS premises for any reason must undergo data sanitisation prior to removal, unless explicitly approved in writing by SARS.
- Data sanitisation must comply with a recognised standard, at minimum:
  - NIST SP 800-88 (Clear / Purge / Destroy), or
  - An equivalent SARS-approved standard.
- The Service Provider must provide auditable evidence of data sanitisation, including:
  - Device serial number
- Sanitisation method used
  - Date, time, and responsible technician
- Temporary backups created during repair, staging, or migration:
  - Must be encrypted using SARS-approved encryption standards
  - Must be stored only on dedicated, SARS-approved backup media
  - Must be securely wiped or sanitised after successful restoration and before any subsequent reuse, in accordance with SS-INFOSEC-07
  - Reusable backup media must be logically dedicated to backup activities only and may not be used for general storage
  - Each reuse cycle must be traceable to a specific device and activity

c. **Endpoint Security and Configuration Baselines**

- All End-user Devices, including WUS and Swap-out units, must comply with SARS-approved endpoint security baselines prior to deployment.
- The Service Provider must not deploy or re-deploy any device unless:
  - Endpoint protection is enabled
  - Disk encryption is active where supported
  - Firmware and OS security updates are applied
- Devices capable of wireless connectivity (including Mi-Fi devices, Wi-Fi dongles, tablets, wearables, and biometric devices) must be explicitly authorised and configured in accordance with SARS security standards.
- No unauthorised peripheral, storage media, or wireless device may be connected to a SARS End-user Device.

© South African Revenue Service 2026

d. **Logging, Monitoring and SOC Integration**

- The Service Provider must log all security-relevant activities, including:
  - Authentication and access events
  - Administrative actions
  - Device configuration changes
  - Data sanitisation and disposal events
- Security logs must be retained for a minimum period specified by SARS and be made available on request.
- The Service Provider must immediately notify SARS of any actual or suspected security incident, including but not limited to:
  - Data exposure or loss
  - Malware infection
  - Unauthorised access
  - Device theft or compromise
- Security incidents must be reported within timelines defined by SARS CSIRT, and the Service Provider must cooperate fully with:
  - SARS SOC
  - SARS CSIRT
  - Any forensic or investigative process

e. **Incident Response and Forensic Readiness**

The Service Provider must maintain a documented incident response capability aligned to industry best practice.

- Devices suspected of involvement in a security incident must not be altered, repaired, or redeployed without SARS authorisation.
- The Service Provider must preserve forensic evidence and maintain chain-of-custody where required.
- Root cause analysis must be performed for all security incidents, and corrective actions must be formally documented and implemented.

f. **Warehousing, Logistics and Physical Security**

- All warehousing facilities must meet physical and logical security controls aligned to ISO/IEC 27001.
- Devices in storage, transit, refurbishment, or disposal must be tracked end-to-end, including:
  - Location
  - Custodian
  - Status
- Data-bearing devices must be sanitised prior to refurbishment, redeployment, or disposal.
- The Warehouse Management Portal:
  - Must enforce role-based access control
  - Must use secure authentication
  - Must encrypt data in transit and at rest
- The Portal must be subject to regular security testing, including vulnerability assessments.

g. **Personnel Security and Vetting**

- All Service Provider and subcontractor personnel must undergo SARS-required security screening and vetting prior to access.
- Personnel must sign confidentiality and secrecy undertakings in accordance with SARS requirements.

© South African Revenue Service 2026

- Access must be revoked immediately upon:
  - Role change
  - Contract termination
  - Disciplinary action

h. **Subcontractor Security Obligations**

- Subcontractors must comply with all security requirements in this BRS as if they were the primary Service Provider.
- The Service Provider remains fully accountable for subcontractor security failures.
- SARS reserves the right to audit subcontractor security controls.

i. **Audit, Assurance and Compliance**

- SARS may conduct security audits or assessments at any time with reasonable notice.
- The Service Provider must remediate identified security weaknesses within SARS-defined timelines.
- Failure to comply with mandatory security requirements constitutes a material breach of contract and may result in penalties, service credits, or termination.

j. **Identity, Authentication and Privileged Access**

- All Service Provider personnel accessing SARS systems or devices must use unique, individual user accounts.
- Multi-Factor Authentication (MFA) is mandatory for:
  - Remote access
  - Privileged access
  - Administrative functions
- Privileged access must be time-bound and role-based, aligned to the principle of least privilege.
- Shared accounts, generic credentials, or credential reuse are strictly prohibited.
- Remote access to SARS systems must be protected by SARS-approved secure access controls, and compensating controls must be implemented where VPN access is not used.

6 COMMON SERVICE DEFINITIONS AND REQUIREMENTS

The Service Provider must provide all the services detailed in this paragraph 6 unless otherwise specified.

6.1 Service Management

The Service Provider appointed will be required to maintain standards of service management and/or conform to best practice IT Service Management in their organisations dealing with the following processes:

- Incidents Management;
- Problems Management;
- Change and Release Management;
- Configuration Management;
- Service level management;
- Performance and Capacity management; and
- Service management reporting.

The Service Provider must hold an ISO certification (ISO 20000 – IT Service Management) OR a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of 4 (quantitively managed or equivalent) or higher.

The appointed service provider must have a well-established, IT Service Management system/toolset that is automated to support the efficient and effective delivery of IT services to SARS. The automated system will have a ticketing and incident management module that allows for the automated creation, assignment, tracking of ticket, notifications and escalation based on pre-defined rules. The CMDB module should automatically keep track of the configuration items (CIs) in the IT infrastructure. The solution should allow for the automated creation, assessment, and approval of change requests. Furthermore, the automated system will have robust service management reporting and analytics capabilities. It should generate automated reports and dashboards, providing insights into various ITSM metrics, such as ticket volumes, resolution times, SLA compliance, and other performance indicators. This enables data-driven decision-making and helps identify areas of improvement.

Service Providers have two choices: they can either connect their systems to the SARS service management platform, offering an external web interface available 24/7 for reporting incidents and tracking updates, or handle requests and issues directly within the SARS system.
Regardless of the method chosen, Service Providers must cover all licensing fees necessary for their staff to access and work with the SARS service management system or to facilitate integration.

The Service Provider will be expected to participate, provide information and perform tasks as may be prescribed by the SARS PPS&G in terms of incident, problem, change, service level management, performance and capacity management.

The Service Provider may, in addition and at its own cost, develop and implement an interface between the SARS Service Management System for incident management. SARS will co-operate with the Service Provider in developing such an interface, but SARS reserves its rights to make configuration changes as and when it sees fit to the SARS Service Management System and will give the Service Provider reasonable notice of its intended changes. Any costs relating to the hardware, software licensing, maintenance and configuration of the interface will be for the Service Provider.

Therefore, SARS recommends that the Service Provider determines the feasibility (number of incidents per month) to integrate during the Transition period since there are several factors to consider when integrating with SARS as per below:

- Hardware costs;
- Software costs;
- People costs being on standby and resolving technical issues, testing after changes on firewalls, network, servers, software, etc.;
- Security considerations exposing more interfaces, etc.; and
- Customisation / development costs.

The Service Provider will have the capability to log, receive, route and update tickets remotely without VPN services required during the Transition period. The Service Provider must ensure sufficient personnel are provided (remotely where required) to meet the contractual performance standards, including the Service Levels.

If the Service Provider receives sufficient incidents and there is a benefit to SARS and the Service Provider and it is viable to integrate, then the Service Provider should pursue the integration route.

© South African Revenue Service 2026

Currently, the SARS standard for Service Management (Incident Management) integration is Web Services as per below:

- Enterprise Service Bus (Broker) and B2B Gateway (DMZ);
- Integration (Inter-Enterprise);
- Messaging (Queues) and Web Services;
- Async (Queues) and Sync (Web Service Calls);
- Request-Response;
- Integration Time: Near real-time;
- Message Multiplicity: Single Entity; and
- Message Size: Small.

The Bidder must note that the integration approach described above reflects the current SARS environment and standards as at the date of issue of this document. SARS reserves the right, at any time during the Term, to replace, upgrade or otherwise change the SARS Service Management System and/or the applicable integration standards, interfaces, security requirements and technical specifications. Where such change is implemented by SARS, the Service Provider must, within a reasonable period and in accordance with SARS direction, implement and maintain the necessary integration to the replacement solution (or alternative interface/process prescribed by SARS) to ensure continuity of service, without claiming that such work is out of scope and without additional charge to SARS (save to the extent that SARS has expressly approved a change in writing through the applicable contract change control process).

Table C-1 sets out the number and type of SARS Service Management System licenses that SARS will make available to the Service Provider for Tower E. The Service Provider may, during the Term, with 30 (thirty) days' notice, request additional Service Management licenses. However, the Service Provider must note that the costs associated with such additional licenses will be recovered from the Service Provider.

Table C-1. SARS Service Management System licenses that will be made available per Service Management module for Tower E

License type	Tower E
Change Management	2 x Service Management Suite Named
Configuration Management	5 x Service Management Suite Named
Incident Management	6 x Service Desk Named
Problem Management	1 x Service Desk Named
Release Management	1 x Service Desk Named

SARS reserves the right to change its service management system during the intended Term.

The table below sets out the number of Seats that SARS will make available for Service Provider personnel performing service management services for Tower E.

Table C-2. Number of Seats provided by SARS for use by Service Provider service management personnel

Function	Site	Tower E
Change Management	Lehae La SARS / IT building PTA	0
Configuration Management	Lehae La SARS / IT building PTA	2
Incident/Problem Management	Lehae La SARS / IT building PTA	0
Incident/logistics Co-Ordinator	Lehae La SARS / IT building PTA	3
Release Co-Ordinator	Lehae La SARS / IT building PTA	0

© South African Revenue Service 2026

The Service Provider must ensure that sufficient personnel is provided to meet the contractual performance standards, including the Service Levels, regardless of the number of Seats provided by SARS. The Service Provider must monitor the utilisation of the licenses and Seats and must submit a request to SARS for the increase / decrease of the number of licenses and/or Seats as and when required. SARS will review the request for the additional/reduced requirement and, if approved, adjust the provisioning accordingly within 30 (thirty) days from the date of the request.

The Service Provider will not be excused from its obligations to meet the Service Levels if SARS is unable to meet the number of licenses and Seats that are requested by the Service Provider in excess of the numbers in Tables C-1 and C-2. SARS will, on a regular basis, review the license and Seat utilisation across all services and functions by the Service Provider and if the number of licenses and Seats provided by SARS cannot be justified, SARS reserves the right to reduce the allocations accordingly.

6.2 Device-based Services

The applicability of the Device-based Services to categories of Tower E End-user Devices is set out in Section 10.4

6.3 Service Descriptions

The Services are set out at a high level in this document and must be read together with the provisions set out in the statements of work in the *Master Services Agreement End-user Device Support Services,* in particular Schedule B (Service Management Services SOW) and Schedule B-E (End-user Device Support Services SOW).

The Bidder will be required to compile detailed operational procedures based on the requirements set out for the device categories during Transition. The Bidder must reference the relevant provisions in Schedule B (Service Management Services SOW) and Schedule B-E (End-user Device Support Services SOW) of the *Master Services Agreement End-user Device Support Services* for a detailed description of the obligations required during Transition.

6.4 General obligations applicable to all Device-based Services

The Bidder must take special note of the service management-related activities set out in the Schedules listed above, which are applicable to all the services described hereunder. The Bidder must include these service management activities in its costing and pricing for the services.

6.5 General housekeeping activities

Unless specifically excluded, general housekeeping activities must be performed every time the Service Provider is required to perform either a repair or Standard Chargeable Service. These activities must be included in the Bidder's costing and pricing for the services. The general housekeeping activities must include at a minimum:

- Verifying the condition of the device;
- Specifying any visible damage or defect to the device in the call closure report;
- Verifying that the asset tag and serial number is recorded correctly in the SARS CMDB and securely attached to the device;
- Verifying the asset information (device description; room number, user/owner information, etc.) and updating the information if needed;
- Basic cleaning of the device and the device's immediate environment;
- Verifying that the installation and placement of the device and related equipment does not place the device, related equipment or personnel at risk, for example, loose cabling;

- Advising the user as to the device's operation and placement, including any such items noted in the call closure report.
- Verifying that users can access network applications by confirming that all necessary connections, including cables, wireless configurations and network peripherals are securely connected and properly configured before call closure;
- Identifying and addressing potential issues or areas requiring preventive maintenance;
- Verifying that all components and peripherals attached to the device are functional and operating before the call is closed;
- Obtaining the user's signoff that the device is fully operational and housekeeping activities checklist was conducted; and
- Logging/assigning an incident and/or problem ticket for repair or other services outside the scope of the Service Provider's contracted services that are ascertained to be required during the performance of housekeeping activities.

6.6 **Break-fix Service Descriptions**

The services described below represent the different Break-fix services that are required to be provided by the Service Provider. The Break-fix services that are required for the device categories in the Tower are listed in Table E-2 for Tower E. The bidder will be required to provide rates for the different Break-fix services and SARS will elect which Break-fix service will be applicable to specific models of equipment.

For example, the Bidder must provide pricing for Swap-out services and Break-fix In-warranty services for end user devices. SARS may elect to receive Break-fix In-warranty services for printer equipment that is still under warranty and for Out-of-support printer equipment, SARS may elect to receive Swap-out services. SARS will pay the monthly per device Break-fix In-warranty fee for its printers that are under warranty and the monthly per device Swap-out services fee for its Out-of-support printers and receive the services accordingly.

Break-fix services include the restore of the device to its last working configuration.

6.7 **Break-fix services required for devices under warranty**

The Break-fix services required by SARS include services to be performed for devices that:

(1) Have been procured with a warranty period, during which defects will be repaired free of charge and such devices are still within the warranty period; or
(2) Are covered by a repair contract from a third party.

These devices will be categorized as "**In-warranty**" devices.

During Transition, the Service Provider will be required to establish and/or verify the warranty status of all in-scope devices. The presumption will be that a device is under warranty (and therefore will be classified as an In-warranty device) unless the Service Provider can provide reasonable evidence to the contrary to SARS.

SARS may contract with a third-party provider to ensure the availability of spares and to guarantee the repair of critical devices. Where such arrangements have been made for an Out-of-warranty device, such device will be regarded as an In-warranty device, and the In-warranty rate will apply. The Service Provider must protect SARS's investment in such warranties by ensuring that repairs are carried out in a way that maximizes the advantage of the warranty conditions and not do anything that would prejudice the warranty conditions that SARS procures with such devices.

© South African Revenue Service 2026

Regardless of such arrangements, the Service Provider must provide the necessary service management, co-ordination and other required services to affect the repair under the terms of the warranty from the warranty provider or under the terms of the repair contract from the third party.

6.8 **Break-fix Services Required for Devices not Under Warranty**

The Bidder is required to provide Break-fix services for devices that are not under a warranty and that are not the subject of a third-party repair contract from a warranty provider. These devices will be categorized as "**Out-of-warranty**" devices.

For Out-of-warranty devices, the Bidder must provide full Break-fix services, including the repair for the monthly rate. The Bidder must, therefore, include the cost of all activities, parts, labor, etc. to effect repair of the device in the monthly rates.

If the cost to repair an Out-of-warranty device, for which the Service Provider is obligated to repair for the monthly charge, will be greater than 60% of the replacement cost of the device, the Service Provider must inform SARS that the device is "**Uneconomical To Repair**" and SARS may elect to replace the device at its own cost. For clarity, the cost to repair refers to a single incident and not the accumulated repair cost for a device over its lifetime. If the Service Provider must provide a Whole Unit Spare (WUS), the Service Provider must provide and leave the WUS in place for 45 (forty-five) days or until SARS provides a replacement device, whichever occurs first. After 45 (forty-five) days, the Service Provider may remove the WUS, whether SARS has provided a replacement device or not. The installation of the replacement device provided by SARS in the place of the UTR device must be made by the Service Provider at no additional charge to SARS.

6.9 **Break-fix Services for Devices that Require only the Facilitation of Repair (Exclude actual repair activities)**

For this category of devices, the Service Provider will be required to perform the service management and all co-ordination activities to facilitate the repair, including the sourcing of a certified repair provider, and activities to re-install the repaired device. These devices will be categorized as "**Service-only**" devices.

The Service Provider must engage a certified repair provider(s) for the repair of the device, obtain quote(s) and submit all relevant information and the quote to SARS for approval. On approval the Service Provider must co-ordinate all activities to have the device repaired, including making payment to the repair provider. The Service Provider will then submit an invoice to SARS for the cost of repair at no markup. SARS may elect to nominate a repair provider, in which case the Service Provider will co-ordinate all repair activities with such repair provider.

In determining the rates for Service-only devices, the Bidder must exclude the actual cost of the repair of the device from the monthly rate.

6.10 **Break-fix Services that Qualify for Permanent Replacement**

For this category of devices ("**Swap-out**" devices), the Service Provider must permanently replace faulty devices from a pool of SARS-provided Swap-out units. If of an incident affecting a device in the category for which a Swap-out service has been selected by SARS, the Service Provider must diagnose and attempt to repair the affected device. If the fault in the affected device cannot be rectified by the Service Provider, the faulty device must be permanently replaced with a functioning device from the pool of SARS-provided Swap-out units. All other activities must be performed, including the updating of the SARS CMDB with the details of the Swap-out device and the faulty device. The faulty device must be returned to SARS.

© South African Revenue Service 2026

The Swap-out service can only be provided using Swap-out units from a SARS-provided pool and any unit used to Swap-out a faulty device must be a SARS asset. The Swap-out service is not to be confused with the WUS service, which *temporarily* replaces a faulty device with a functioning device while the faulty device is being repaired.

The process of taking on SARS-provided Swap-out units will be defined and undertaken during Transition. The number of Swap-out units to be provided by SARS for the Swap-out pool will be determined as part of the Transition project and will take into consideration the distribution of units deployed, the manufacturer specifications for mean time to failure, and industry guidelines for spares pools.

6.11 WUS Services

The WUS service is not a service provided on its own but is provided as an option in conjunction with the In-warranty, Out-of-warranty and Service-only Break-fix services. The Break-fix service descriptions for each device category specify whether a WUS service must be provided (either Service Provider provided or SARS-provided as per the service description). If a WUS service is specified, the Bidder must include the cost to provide a WUS at the related monthly rate.

6.12 Summary of Break-fix Services and Related Process Flows

The purpose of the process flow diagrams in Attachment A is to highlight major differences between the different processes and must not be taken as a comprehensive list of activities that have to be performed by the Service Provider. The process flow diagrams will be used as the basis for the process design to be documented by the Service Provider during Transition.

Table C-3 Break-fix service process flow diagrams

Break-fix service process flow diagrams	
In-warranty where a WUS is applicable	Attachment A Diagram 1
In-warranty where a WUS is not applicable	Attachment A Diagram 2
Out-of-warranty where a WUS is applicable	Attachment A Diagram 3
Swap-out repair	Attachment A Diagram 4
Service-only repair where a WUS is applicable	Attachment A Diagram 5
Service-only repair where a WUS is not applicable	Attachment A Diagram 6
Service Provider-provided WUS process	Attachment A Diagram 7
SARS-provided WUS process	Attachment A Diagram 8

6.13 Standard Chargeable Services

Standard Chargeable Services must be provided on request by SARS. Bidders must provide pricing for the Standard Chargeable Services as listed and described below. In addition, Bidders must provide volume-based pricing for Standard Chargeable Services for volumes of 20, 50 and 100 with the assumption that all these volumes will be on the same site per request.

SARS may request a quote for a project to perform such standard services across multiple devices. It is expected that the quote for a project to perform these services across multiple devices will be less than the aggregate of the Standard Chargeable Service charges if SARS was to request them individually per device. It will be at SARS's sole discretion to accept the quote for the project or to make individual requests for the Standard Chargeable Service to be performed for each of the devices.

Rates for the Standard Chargeable Services must be submitted by the Bidder for each Site Classification (Metro, Town or Rural).

Table C-4 Summary of Standard Chargeable Services and related process flows

Standard Chargeable Services	
Pre-production Preparation/Staging	Attachment A Diagram 9 The Service Provider may be expected to attach a SARS barcode as part of the pre-production Preparation/Staging process.
Installation	Attachment A Diagram 10
Replace	Attachment A Diagram 11 (The replace process is included in the process flow for Installation)
Move	Attachment A Diagram 12 Moves within a building, the Service Provider must perform the transport of the device at no extra charge and without any pass-through costs to SARS.
Add/Change	Attachment A Diagram 12.1
Decommission for Re-use	Attachment A Diagram 13.1
Decommission for Disposal	Attachment A Diagram 22.1
Repair/Support	Attachment A Diagram 15.1
Expedited Service Request	On request by SARS: • Provide SARS with a commitment to the best possible time to respond/repair a device. • On acceptance of the expedited commitment, perform accordingly. • Obtain signoff from a SARS representative. • Submit invoice for Expedited Service Request. An Expedited Service Request will only be charged on a request being made by SARS and the committed time to respond/repair being accepted by SARS. (No process flow diagram is presented for Expedited Service Requests)
Consumable (Service Provider-provided)	Attachment A Diagram 16
Consumable (SARS-provided)	Attachment A Diagram **17**
Delivery Acceptance Test	Attachment A Diagram 17 The Service Provider may be expected to attach a SARS barcode as part of the Delivery Acceptance process.

6.14 **Miscellaneous Services**

SARS may, from time to time during the Term, request miscellaneous services as set out in Table C-5. Where the Service Provider quotes for such services in response to a request by SARS, such quote must be made using the personnel rates submitted in the Service Provider's Proposal and the number of hours and personnel skill level quoted must be substantiated in full.

Table C-5 Summary of Miscellaneous Services and Related Process Flows

Miscellaneous services	
Secure Courier Service	On request by SARS: • Provide a quotation for the secure transportation of devices, including the insurance of the devices (the risk of loss of damage will be borne by the Service Provider while the device is under the Service Provider's care or possession). • On acceptance of the quotation by SARS, perform the courier service. • Invoice SARS as per the proposal, either on the completion of milestones or otherwise as agreed in the proposal. Service Provider to update the CMDB.
	Asset Management Asset Tracking: The courier service should have a robust system for always tracking the location and status of assets. Full live Tracking of devices in transit with full audit trail available at all stages. Delivery Confirmation: The courier service should provide proof of delivery, such as signed receipts or digital confirmation. Asset Valuation: The courier service should note and use the replacement valuation of assets for insurance purposes. **Packaging** Asset Protection: The courier service should have measures in place to protect assets from damage during transit. This includes proper protective packaging, handling, and transportation procedures. Protective Packaging: This serves as a shield for products, safeguarding them against potential hazards during transportation. It acts as a buffer, absorbing shocks, and vibrations, and protects against environmental factors. Damage Prevention: The Bidder should ensure that damage prevention and proper packaging are included. Proper packaging significantly reduces the risk of damage caused by mishandling, collisions, or drops during transit. Protective packaging also acts as a barrier against moisture, dust, and dirt to preserve the item's quality, functionality, and appearance. **Security Provided** Secure Delivery: The Bidder should ensure that the package arrives safely and securely at its destination. This includes tamper- and damage-proof packaging, authentication protocols, real-time tracking, and confidentiality. **Transparent** End-to-End Surveillance: Secure courier services should be painstakingly thorough and

Miscellaneous services	
	cautious throughout both the shipping and delivery process. This means tracking all key points along the way: pick up, drop off, and shipping route Identity Verification: The Bidder should ensure that verification of delivering recipient's Identity is done to ensure they are items to the correct person. Physical Security: The Bidder should ensure that the equipment can be transported with armed security for large shipments between sites on request. **Integration with Warehouse Services** The Bidder should ensure that their transport services are integrated into their warehousing solution
Project Service	On request by SARS: • Provide a quotation for Project Services • On acceptance of the quotation by SARS, perform the project service. • Invoice SARS as per the proposal, either on the completion of milestones or otherwise as agreed in the proposal. Service Provider to update the CMDB.
Warehousing	On request by SARS: • Provide a quotation for the secure storage of devices. • On acceptance of the quotation by SARS, perform the storage service. • Invoice SARS as per the proposal, either on the completion of milestones or otherwise as agreed in the proposal. Service Provider to update the CMDB.

For clarity, the table below sets out the responsibilities of certain services applicable to Tower E with the high-level responsibilities expected of the Service Provider and the basis on which the Service Provider is engaged. The purpose of Table C-6 is to provide clarity to the boundaries of scope and does not set out to describe the full scope of services.

Table C-6 High level division of responsibilities common to Tower E

Scope		Responsibilities	
		Service Provider	SARS
Device-based Services	Incident detection, filtering, correlation, first line diagnosis and first line repair activities.	If, as part of standard housekeeping tasks, an incident is detected it must be reported to SARS.	SARS monitors all elements of the infrastructure estate and receives calls at the ICT Service Desk and IT Operations Centre. First line diagnosis and remote rectification activities.
	Open ticket and route to support group.	Where required or directed by SARS.	Open ticket on SARS Service Management System. If related to a failure on a device within the scope of services, route to Service Provider.
	Receive ticket	Service Provider must receive the ticket from the SARS system.	
	Perform onsite diagnosis and repair/Swap-out	Service Provider must confirm device is functioning, it is on SARS' network, and that the SARS support teams can remotely	

Scope		Responsibilities	
		Service Provider	**SARS**
		access the device.	
	Close ticket	Service Provider must place the ticket into resolved status on the SARS system.	SARS closes the ticket.
	Release management	Adhere to SARS release management PPS&G. Manage and/or participate in a release as and when required.	Manage and support release management process.
	Change management	Adhere to SARS change management PPS&G. Manage and/or participate in a change as and when required.	Manage and support change management process.
	Problem management	Adhere to SARS problem management PPS&G. Manage and/or participate in a problem investigation and remediation as and when required.	Manage and support problem management process.
Standard Chargeable Services	Pre-production Preparation/Staging	Perform on request by SARS.	Initiate request
	Installation		Initiate request
	Replace		Initiate request
	Move		Initiate request
	Add/Change		Initiate request
	Decommission for Re-use		Initiate request
	Decommission for Disposal		Initiate request
	Expedited Service Request		Initiate request
Other Services	Secure Courier Service	On request by SARS: provide quote at standard rates; on acceptance, perform courier services.	
	Secure Storage Space	On request by SARS: provide quote at standard rates; on acceptance, provide storage space.	
	Projects (including Project Management)	On request by SARS: provide quote at standard rates and on acceptance execute the project.	Initiate request
	SLA Management	Perform on continuous basis.	
	Capacity Management	On request by SARS: provide information.	Perform
	Availability Management		Perform
	Performance Management		Perform

6.15 **Service Provider Management Personnel**

The Service Provider must provide an Account Executive, Service Delivery Manager and Operations Manager. At least one of the Service Delivery Manager and the Operations Manager must maintain a presence and actively monitor and manage the delivery of Service during office hours, service outages and extended office hours as required during SARS high focus and/or peak periods at SARS Head Office in Brooklyn, Pretoria. The Account Executive, Service Delivery Manager and Operations Manager will be designated as Key Service Provider Personnel (see *Master Services Agreement End-user Device Support Services)* for the definition and conditions relating to the appointment and replacement of Key Service Personnel and the requirement for SARS to approve such appointments). The Account Executive will be non-billable as this is a standard practice for Service Delivery. Operations Manager should not be deployed to perform technical functions.

The table below sets out the number of Seats that SARS will make available for Service Provider onsite management personnel for Tower E, respectively.

Table C-7 Number of Seats provided by SARS for use by onsite management personnel

Function	Site	Tower E
Account Executive/Service Delivery Manager	Lehae La SARS / IT building PTA	1
Operational Manager	Lehae La SARS / IT building PTA	1

SARS requires the availability of Key Service Provider Personnel for regular meetings to be held at SARS's request at SARS premises. SARS may also require the presence of Key Service Provider Personnel at ad hoc meetings at SARS'S premises with reasonable notice. Reasonable notice will be determined considering the urgency with which the subject matter of the meetings is to be addressed.

In addition to the requirements specified in the *Master Services Agreement End-user Device Support Services*, SARS requires the Account Executive, Service Delivery Manager and Operations Manager to hold positions of sufficient authority within the Service Provider's organization to provide an effective escalation point for issues that may arise during the Term. The Service Provider's Account Executive, Service Delivery Manager and Operations Manager must have a good understanding of the principles of service management and must preferably hold an ITIL certification (foundation or higher).

6.16 **Project Support**

As and when required by SARS, the Service Provider will be required to provide ad hoc project management support for the roll-out of projects. The engagement of the project management support must be provided by the Service Provider at the Personnel Rates submitted by the Service Provider in its *Tower E Pricing Response Template*. All project support must be agreed in writing via a signed Project Initiation Document, stating scope, deliverables, duration and a cap on hours or cost.

6.17 **Consulting**

The Service Provider will be required to provide SARS with *ad hoc* advisory services related to the Services at no additional charge.

Formal consulting assignments may be engaged on a paid-for basis at the consulting rates as provided in the Service Provider's Proposal. Formal paid-for consulting assignments may only be provided after specific written authorization by SARS to the Service Provider.

© South African Revenue Service 2026

South African Revenue Service

6.18 **Training**

The Service Provider will not be required to provide formal training to SARS personnel as part of the base services.

SARS may also contract the Service Provider to provide training as part of a Project on a Time and Materials basis.

6.19 **Administration**

The Service Provider will be required to perform administrative activities that are obligatory for the effective delivery of the Services as detailed in this *Business Requirements Specification* and the *Master Services Agreement End-user Device Support Services* which include:

- Effective management of meetings (schedule, agenda, attendance register, minute etc.);
- Information management (maintain equipment lists, site lists, standby lists, etc.);
- The production and distribution of reports: annual, weekly, monthly, daily and ad hoc reports as required by the contract, as specified by SARS during Transition and otherwise as reasonably required by SARS; and
- Ticket completion (updating of all relevant documents and systems, e.g. the CMDB, invoicing etc.).

The Service Provider must take note of the obligation regarding SARS's Oath of Secrecy screening and vetting obligations to be performed for Service Provider personnel in the *Master Services Agreement End-user Device Support Services*.

7 RESEARCH AND DEVELOPMENT

In the constantly advancing technological environment, it is imperative for our organization to commit to research and development efforts to maintain a competitive edge and optimize the utilization of tools, systems, and hardware investments within SARS. To accomplish this objective, the Service Provider is required to provide the necessary resources and support to facilitate innovation and exploit contemporary technologies for SARS' advantage, in accordance with SARS's requirements and strategic objectives. This involves the provision of hardware, software, and expert personnel to strengthen state-of-the-art research and development proof of concepts and technologies. By fulfilling these obligations, the Service Provider enables SARS to investigate innovative concepts, evaluate pioneering methodologies, and validate technological suitability and value within the SARS context. As part of the research and development services, Bidders are expected to provide expertise and recommendations in the areas listed below.

7.1 Tower E: End-user Device Support Services

Service Providers should monitor and analyze trends, emerging technologies, and best practices in the field of end-user devices, taking into consideration device compatibility, functionality, and security. The Service Provider should provide strategic guidance on device selection, innovative approaches to device management, and advanced troubleshooting and diagnostic tools to ensure seamless user experience, productivity, and cost-effectiveness.

7.2 Flexible Support Services

The Service Provider shall be required to provide flexible support services to accommodate SARS's changing needs and requirements concerning the support of evolving technologies and business demands.

7.2.1 **Adaptive Service Delivery**

The Service Provider shall demonstrate the capability to expeditiously adapt to SARS's varying needs by delivering prompt and efficient support services in response to fluctuating demands, technological progress, and shifting business requirements. This includes, but is not limited to, the deployment of supplementary resources, the reallocation of existing resources, and the modification of support processes and procedures as necessary.

7.2.2 **Proactive Technology Support**

The Service Provider shall proactively monitor and stay informed about advancements in technology and industry best practices to ensure that SARS receives adequate support. This includes providing guidance and recommendations for the adoption of new technologies, upgrading existing systems, and optimizing the overall IT infrastructure.

7.2.3 **Scalable Support Model**

The Service Provider shall implement a scalable support model capable of accommodating the growth and expansion of SARS's IT infrastructure and services. This includes the ability to adjust support levels, resource allocation, and service offerings as needed to meet SARS's evolving demands and requirements.

7.2.4 **Agility in Service Implementation**

The Service Provider shall be capable of rapidly implementing new services, processes, or support structures in response to SARS's shifting needs and requirements. This includes the ability to efficiently integrate new technologies, systems, and solutions into the existing IT environment, while ensuring minimal disruption to SARS's business operations by conforming to the service management frameworks.

7.2.5 **Collaborative Approach**

The Service Provider shall work collaboratively with SARS to understand its changing needs and requirements and develop and implement effective support strategies accordingly. This includes maintaining open lines of communication, actively seeking feedback, and continuously refining support processes and procedures to ensure optimal service delivery.

8 WAREHOUSING AND REVERSE LOGISTICS

Warehousing (Storage Facilities) is required in the following regions throughout South Africa:

- Gauteng (Pretoria);
- Mpumalanga (Nelspruit);
- KwaZulu-Natal (Durban Metro);
- Eastern Cape (East London);
- Eastern Cape (Gqeberha);
- Western Cape (Cape Town);
- Northern Cape (Upington);
- Limpopo (Polokwane);
- Northwest (Rustenburg); and
- Free State (Bloemfontein).

© South African Revenue Service 2026

The Warehousing services must comply with general accepted safety and security standards as noted in ISO 9001, ISO 14001, ISO 45001 and ISO 27001 and always align to industry best practices during the term of the contract. Paragraph 8.1 fully describes functionality required of Warehousing services/management.

As SARS strives for efficiency and cost-effectiveness, the process of reverse logistics plays an increasingly important role in device management. A Service Provider with geographically dispersed warehousing capabilities will offer seamless solutions for handling device distributions, returns and redistributions. This approach not only exemplifies environmental responsibility but also assists in maintaining a clutter-free workplace by ensuring that only operational computers are present on SARS's premises. Consequently, the Service Provider's reverse logistics capabilities ensure a streamlined process for device lifecycle management, while promoting physical endpoint security and asset management best practices.

New endpoints should be configured on SARS premises to SARS standards and subsequently booked into the Service Provider's reverse logistics system. From that point, devices should be efficiently handed over to users at a branch location, or potentially, in the future, delivered directly to the user's home.

In line with technological advancements and evolving industry standards, the configuration of the devices will continuously mature and modernize over time. As new automation capabilities become available, the Service Provider will ensure seamless integration of these features, enhancing both performance and user experience. This progressive approach not only enables SARS to stay ahead in the rapidly changing digital landscape but also ensures that their device lifecycle management remains efficient and cost-effective. Moreover, adopting modern configurations will empower SARS to maintain its focus on security and sustainability while promoting innovation and adaptability within its workforce.

Outdated, replaced devices will be collected from end users and entered on the reverse logistics system for assessment. During this stage, they will be evaluated for possible refurbishment and potential re-issuing to other users. If refurbishment is deemed unfeasible, the devices will be decommissioned in accordance with SARS's regulations and best practices. This systematic approach ensures that SARS's resources are optimized, contributing to a more sustainable and cost-effective device lifecycle management process.

The decommissioning and disposal process for devices that are no longer suitable for use within SARS will be performed according to SARS's internal policies and operating procedures, which may include redeployment, donations, sale, and destruction.

The Service Provider must also have the necessary facilities, resources, and expertise to perform diagnostic assessments, repairs, and refurbishments of end-user devices as required. This includes maintaining a supply of spare parts and components to minimize repair turnaround times and maximize device uptime.

8.1 Warehouse Management Portal

The Service Provider must have implemented the planned Warehouse Management Portal as accepted and approved by SARS before the end of the Transition project. Any changes identified in the Transition project must be fully operational within the Warehouse Management Portal within 60 (sixty) days thereafter.

The Service Provider must provide a Warehouse Management Portal that delivers, at a minimum, the following functionality to SARS through a secure internet connection:

- **Inventory Management:** The platform must provide comprehensive inventory management features, including tracking device quantities, locations, and statuses (e.g., stored, donated, or sold). The system must enable real-time updates, alerts for high and/or low stock levels, audit trails, and reporting tools for inventory analysis.

- **Reporting and Analytics**: The Warehouse Portal must include reporting and analytics capabilities, offering insights into inventory levels, and other relevant data. These insights can inform decision-making, optimize warehouse utilization, and identify areas for improvement.

- **User Management and Access Control**: The system must provide robust user management and access control features, ensuring that only authorized staff members can access and interact with the Warehouse Portal. This includes options for role-based permissions, secure authentication methods, and audit logging for tracking user activity.

- **Scalability and Flexibility:** The Warehouse Portal must be designed to scale and adapt to SARS's changing needs, accommodating growth in the number and variety of devices managed and the evolving requirements of the reverse logistics and warehousing processes.

The Bidder is required to provide details of its current capability to deliver the Warehouse Management Portal requirements as set out above, as well as details of its plan, including timelines to which the Bidder is prepared to commit, to implement the full functionality as set out above. SARS's requirement is to have the Warehouse Management Portal fully operational with all required changes fully implemented within 60 days after the transition period.

The Bidder shall be responsible for the development and implementation of a comprehensive Warehouse Portal solution in compliance with the requirements outlined herein, adhering to industry best practices for user experience, security, and performance.

Furthermore, the Bidder shall maintain open channels of communication and engage in continuous collaboration with SARS to ensure the Warehouse Management Portal aligns with SARS's needs and expectations and adapts to evolving requirements.

The Bidder is obligated to deliver a Warehouse Portal solution that meets the stipulated requirements and integrates effectively with the existing systems, thereby enabling the efficient management of end-user devices within SARS.

9 TRANSITION PROCESS (COMMON REQUIREMENTS)

9.1 Transition Plan

The Service Provider is expected to provide a transition plan that contains key elements for a transition project to achieve a successful transition and minimize disruptions and compromise services to SARS. The transition plan for the appointed Service Provider should clearly elaborate on the following aspects:

- Projects Phases: Clearly stipulated stages of the transition project (e.g., Initiation, Planning, Execution, Monitoring, Closure);
- Project Management: The Project schedule for the transition process with scope, timelines, dependencies, milestones, deliverables, based on the services provided in Tower E and showing a maximum transition period of 3 (three) months;

- Roles and Responsibilities to be defined by the appointed Service Provider, SARS and the outgoing Service Provider,
- Stakeholder Engagement and Communication: Approach of managing identified stakeholders and maintaining regular and effective communication channels to keep stakeholders informed throughout the transition process;
- Risk management: Management of identified risks and issues associated with the transition process and mitigation strategies;
- Deployment approach and Migration: Clearly outline the deployment approach, implementation and migration to move services to the appointed Service Provider and specify how downtime and disruptions will be minimized during the transition;
- Training and Knowledge Transfer: Outline training approach and mechanisms of knowledge transfer;
- Quality assurance: Approach and processes to reduce or eliminate errors or defects in the final outcomes of a project establishing standards, guidelines and procedures to prevent quality issues and maintain the integrity of the product or service throughout its development;
- Compliance and Governance: Ensure compliance with relevant regulations and industry standards: and
- Post-transition Support and Optimization: Provide ongoing support and maintenance for the new infrastructure/services following the transition.

9.2 Experienced Transition team

For the transition process, the appointed services provider is required to have multidisciplinary transition team with experience in executing a transition project similar to the size of SARS. The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: Transition Management, Project Management /Program Management, Vendor and Contract Management, IT Service Management and Technical Subject matter experts.

10 TOWER E: END-USER DEVICE SUPPORT SERVICES

10.1 Scope

The scope of SARS requirement for Tower E: End-user Device Support Services comprises nationwide provision of the following:

- End-user device support services (Device-based Services, Standard Chargeable Services, project, consulting and training) for SARS-owned and SARS-managed End-user Devices, including hardware support. Multifunction Printer support services (Device-based Services, Standard Chargeable Services, project, consulting and training) for SARS-owned and SARS-managed Multifunction Printer, including hardware support.). SARS has standardized on two Printer brands namely HP and Ricoh. Service Providers must support these two brands. This includes having the necessary OEM accreditation to provide comprehensive support for these brands, ensuring that the Service Provider's team is ready to offer proficient hardware and parts assistance.

  The successful Bidder will be expected to ensure that their staff are fully trained and up to date with the necessary skills to support the two MFP brands, reflecting a commitment to ongoing professional development and certification in line with the latest technological developments. Furthermore, the Service Provider is expected to guarantee a supply of genuine parts and accessories for the two MFP brands, ensuring swift and effective responses to service requests. This also involves proactive engagement with the OEMs to stay abreast of technological updates, ensuring that SARS benefits from high-quality, secure MFP solutions. This approach aims to uphold a robust, efficient MFP environment tailored to meet SARS's specific operational requirements and security protocols.

© South African Revenue Service 2026

- Supply of consumables for applicable devices.
- Management of OEM and Third-Party Supplier support contracts.
- The common services set out in paragraph 6, including service management, service provider management personnel, administration, research and development, consulting, project management and support.

The services, at a high level, comprise the management of incidents, the provision of defined services relating to the supported equipment, maintenance services; supply of consumables; professional services; the provision of Standard Chargeable Services such as install, move, add, change and decommissioning services; and compliance with required service management procedures.

10.2 **Delivery Model**

SARS currently engages a single Service Provider to provide workstation and Multifunction Printer services. The incumbent Service Provider is managed by SARS and provides the scope as described above. SARS's requirements for services in this Tower now include additional services such as the inclusion of support for additional device types.

10.3 **Transition**

The Service Provider appointed in Tower E is required to complete the Transition Services within 3 (three) months from the Effective Date. By the end of the 3 (three) months, the Service Provider must have assumed full management responsibility for the full scope of End-user Device Support Services.

In addition to any other commitment required in the *Master Services Agreement End-user Device Support Services,* the Service Provider must have:

- verified the warranty status of all End-user Devices;
- Fully designed, developed, implemented the signed-off processes, procedures, schedules and work practices detailed in the *Master Services Agreement End-user Device Support Services,* especially those detailed in Schedule B-E and its attachments;
- Committed to reporting and meeting Service Levels as set out in Schedule C (Service Levels) and Appendices C-E-1 and C-E-2 of the *Master Services Agreement End-user Device Support Services*;
- Determined and defined the method of obtaining the data from the SARS Service Management System, including the assignment of Service Provider personnel to perform transactions on the SARS Service Management System and, if the Service Provider has so elected, to interface its own service management system with the SARS Service Management System;
- Established the required governance as specified in Schedule E of the *Master Services Agreement End-user Device Support Services*;
- Developed and established the necessary interfaces with other SARS service providers required for the delivery of End-user Device Support Services;
- Taken over the management of end-user device support services that are sourced through third parties; and
- Attended any training specified by SARS to understand the SARS environment, systems and operating procedures.

© South African Revenue Service 2026

The Service Provider is not expected to conduct an audit of the devices to be supported. The SARS CMDB will be used as the basis for determining the devices that will form the scope of the Services and for the purposes of billing. If an incident is logged for a device that is not recorded on SARS's CMDB but falls into the categories of supported End-user devices, the Service Provider must attend to the incident on a time and materials basis.

The Service Provider must record all relevant information relating to the device that will enable the device to be recorded on SARS's CMDB and the device will thereafter be deemed to be covered in the support agreement and the Service Provider may thereafter charge for the device according to the rate corresponding to the device's classification. No Service Levels will apply to the restoration of service relating to devices that are not recorded on SARS's CMDB. In the event the Service Provider becomes aware that a device on SARS's CMDB is no longer deployed, it is incumbent on the Service Provider to inform SARS as soon as it has become aware of the device's status.

10.4 Device-based Services applicable to Tower E

SARS has defined the various Device-based Services to be performed in general in paragraph 6.2 above. The categories of End-user devices within the scope of Tower E are set out in Table E-1 below. Table E-2 sets out the Break-fix services that are applicable to the various categories of End-user devices with reference to both Table E-1 and paragraph 6.2.

The details of the number of units, in each category, the number at each site in SARS, makes and models are provided in the equipment lists included in the RFP pack.

- *Tower E Site Classifications*;
- *Tower E End-user Device Categories and Quantities and Devices per site*.

One of the objectives of this RFP is to achieve flexibility in the procurement of services. In this regard, Table E-2 sets out the Break-fix services SARS may require during the Term. The Bidder is required to provide rates for all required services for each End-user device category as set out below, as well as the rates for different Service Levels, Service Coverage Period and Site Classification of the devices. The Bidder is referred to the *Tower E Pricing Response Template* for the details of rates that must be supplied by the Bidder.

During contract finalization, SARS will make an election for each device type as to which Device-based Service must be provided as of the Commencement Date. Thereafter SARS may change the Device-based Service applicable to a type of device with 2 (two) months' notice.

For example, the Bidder must provide rates for Break-fix services (In-warranty, Out-of-warranty, Swap-out and Service-only) for Passport Scanners. SARS may, during contract finalization, elect to contract for Break-fix services (In-warranty) and Break-fix services (Out-of-warranty) for this type of device. With 2 (two) months' notice SARS may change the services applicable to this type of device (and the applicable Charges) to be Swap-out services.

Table E-1: Categories and types of End-user Devices

Category/type	Description/notes
End-user Computing devices	
Desktop (Wintel)	Includes the desktop computer, motherboard, casing, power supply, memory, data storage device, display adaptor(s), keyboard and mouse. This category excludes all Apple desktop devices. Note that this excludes the display/screen unless it is an integrated unit.

Category/type	Description/notes
End-user Computing devices	
Desktop (Apple)	Includes the desktop computer/display, motherboard, casing, power supply, memory, data storage device, display adaptor(s), keyboard and mouse. This category only includes Apple desktop devices. Note that this excludes the display/screen unless it is an integrated unit.
Laptop (Wintel)	Includes the laptop computer/display, motherboard, casing, power supply, memory, data storage device, display adaptor(s), keyboard and mouse. This category excludes all Apple laptop devices Note that this excludes docking stations associated with laptops.
Laptop (Apple)	Includes the laptop computer/display, motherboard, casing, power supply, memory, data storage device, display adaptor(s), keyboard and mouse. This category only includes Apple laptop devices.
Tablet (Wintel)	Includes the tablet computer/display, motherboard, casing, power supply, memory, data storage. This category includes all Wintel tablet devices.
Tablet (Apple)	Includes the tablet computer/display, motherboard, casing, power supply, memory, data storage. This category includes all Apple tablet devices, e.g., iPad,devices.
Tablet (Android)	Includes the tablet computer/display, motherboard, casing, power supply, memory, data storage. This category includes all tablets other than Wintel and Apple devices.

Category/type	Description/notes
Display Devices	
Computer Monitors	The support for computer monitors (e.g., LED/LCD monitors) is separately charged from the computer device. The support for these devices includes display cabling.
Wall-mounted Monitors	Wall mounted monitors/televisions (large format). The support for wall mounted monitors (e.g., plasma, LED, LCD or later technologies) includes cabling and associated devices such as splitter boxes.
Data Projectors	Includes the projector cabling and any other projecting systems.
Interactive White Boards	Includes the cabling, built-in printer mechanisms, screen rollers, etc.
All-In-Ones (AIO)	Display units that integrate all computer processing components into a single unit chassis. This design eliminates the need for a separate computer tower.
Wearable (VR and AR)	Any device that overlays digital information onto user's physical environment. Virtual Reality and Augmented Reality.
Digital Signage Equipment	Display systems for creating and managing dynamic content on digital screens, such as advertising, wayfinding, or informational displays.
VGA Splitter Box	Output signal splitting devices.

Category/type	Description/notes
Input Devices	
Biometric Fingerprint Scanners	Biometric fingerprint scanner for the purpose of personal identification.
Handheld Barcode Scanner	Devices used for reading asset and document barcodes.
Signature Pads	Purpose built devices used for the capturing of signatures.
Camera	Hand-held or mounted cameras for the capture of still sequences or motion video and facial recognition (this excludes security surveillance [CCTV] cameras)
Personal Document Scanners	Standalone document scanners are low volume document scanners directly attached (USB or other direct cable attachment) to a computing device. These are generally for use by a single workstation.
Biometric capable Mice	Mouse that can do fingerprint reading for biometric authentication on Endpoints.
Gesture Controllers	Devices that capture user movements and gestures to interact with computer systems such motion controllers and depth sensing cameras.

© South African Revenue Service 2026

Bulk Document Scanner	High-speed scanning devices designed for digitizing large volumes of paper documents.
Passport Scanner	Purpose built devices used for the scanning of machine-readable passports.

Category/type	Description/notes
Printing Devices	
Barcode Printer	Locally attached (USB) printer devices used specifically for the purpose of printing barcodes.
Braille Printer	Locally attached (USB) printer devices are used specifically for the purpose of printing Braille documents.
Label Printer	Locally attached (USB) printer devices used specifically for the purpose of printing labels.
Thermal Receipt	Locally attached (USB or other cable attachment) printer device using thermal printing technology for the printing of receipts.
Document Printer	Locally attached (USB or other cable attachment) printer devices using laser, dot matrix or inkjet technology (includes mobile printers).
Personal MFD	Locally attached (USB or other cable attachment) multifunction device primarily for printing, faxing and scanning.
Multi-Functional Printers (MFPs)	Network attached multi-function Printer primarily used for bulk printing, scanning and copying.
3D Printer	Locally attached (USB or other cable attachment) or networked printer devices used for additive manufacturing, creating three-dimensional objects.
Plotter	Locally attached (USB or other cable attachment) plotting device.

Category/type	Description/notes
Miscellaneous Computing Devices	
Mi-Fi (Mobile Wi-Fi) devices	Battery-powered mobile hotspots that create a localized Wi-Fi network by connecting to cellular data networks (e.g., 4G or 5G).
Wi-Fi Dongles	Also known as Wi-Fi adapters or USB Wi-Fi adapters, are small devices that plug into a computer's USB port to provide Wi-Fi connectivity. They are typically used to enable Wi-Fi capabilities on devices that do not have built-in Wi-Fi, such as desktop computers or older laptops.

Category/type	Description/notes
Consumables	
Keyboard (including wireless)	USB attached keyboard. Note that OEM supplied keyboards that are replaced as part of a Desktop Break-fix process are not to be charged as consumables and must be included in the In- or Out–of-warranty monthly rates and standard chargeable support costs

Category/type	Description/notes
Consumables	
Biometric Mouse (including wireless)	Optical USB attached mouse. Note that OEM supplied mice that are replaced as part of a Desktop Break-fix process are not to be charged as consumables and must be included in the In- or Out-of-warranty monthly rates and standard chargeable support costs.
Memory Stick and Micro SD Card	32/64/128 GB. These must be supplied on request on a Time and Materials basis.
Laptop batteries	Laptop batteries. These must be supplied on request on a Time and Materials basis.
Laptop chargers	Laptop chargers (65W and 130W). These must be supplied on request on a Time and Materials basis.
Solid State Drive	512GB and 1TB High performance storage device for laptops and desktops. (Internal). These must be supplied on request on a Time and Materials basis.
Memory Module	16GB/32/64 GB RAM modules. These must be supplied on request on a Time and Materials basis.
HDMI Cable	HDMI Cable. These must be supplied on request on a Time and Materials basis.
VGA to HDMI Converter	VGA to HDMI Converter. These must be supplied on request on a Time and Materials basis.
Printer drum unit	Printer drum unit. These must be supplied on a request on a Time and Material basis.
Printer Toner	Black and Color Toners. These must be supplied on request on a Time and Materials basis.
Printer Staples	Stapler cartridges. These must be supplied on request on a Time and Materials basis.

© South African Revenue Service 2026

Table E-2: Detailed Description of Required Break-fix Services Applicable to Device Categories

Category	Break-fix Services				Notes
	In-warranty	Out-warranty	Swap-out	Service-only	
End-user Computing devices					
Desktop (Wintel) - incl. All-in-One Desktop (Apple) - incl. All-in-One Laptop (Wintel) Laptop (Apple)	SP-provided WUS	SP-provided WUS	SARS provided Swap-out unit	n/a	All devices must be repaired on or offsite. The Service Provider may take devices offsite provided that all data backups and sanitizations are completed. The Service Provider must provide a WUS to meet the Service Levels. Service and the rates must include the Swap-out of faulty desktop mouse and keyboard.
Tablet (Wintel) Tablet (Apple) Tablet (Android)	SP-provided WUS	SP-provided WUS	SARS-provided Swap-out unit	n/a	All devices may be repaired on or offsite. The Service Provider must provide a Whole Unit Spare to meet the Service Level. Where SARS has elected for the Service Provider to provide a Swap-out service, SARS will provide the Swap-out unit.
Display Devices					
Computer Monitors	n/a	n/a	n/a	n/a	
Wall mounted Monitors	n/a	n/a	n/a	n/a	
Data Projectors	n/a	n/a	n/a	n/a	
Interactive White Boards	n/a	n/a	n/a	n/a	
Wearable (VR and AR)	n/a	n/a	n/a	n/a	
Equipment Digital signage equipment	n/a	n/a	n/a	n/a	
VGA Splitter Box	n/a	n/a	n/a	n/a	

Category	Break-fix Services				Notes
	In-warranty	Out-warranty	Swap-out	Service-only	
Input Devices					
Biometric Fingerprint Scanners/ Handheld Barcode Scanner/ Signature Pads/ Cameras	n/a	n/a	n/a	n/a	
Personal Document Scanners	n/a	n/a	n/a	n/a	
Passport Scanner	n/a	n/a	n/a	n/a	
Biometric capable Mice	n/a	n/a	n/a	n/a	
Gesture Controllers	n/a	n/a	n/a	n/a	
Bulk Document Scanner	n/a	n/a	n/a	n/a	

© South African Revenue Service 2026

Printing Devices					
Barcode Printer Braille Printer Label Printer Thermal Receipt	n/a	n/a	n/a	n/a	
Document Printer	n/a	n/a	n/a	n/a	
Personal MFD	n/a	n/a	n/a	n/a	
Multi-Functional Printers (MFPs)	SP-provided Loan Unit	SP-provided Loan Unit	SARS-provided Swap-out unit	n/a	All devices may be repaired on or offsite. The Service Provider must provide a Loan Unit device to meet the Service Levels were indicated.
Plotter	n/a	n/a	n/a	n/a	
3D Printer	n/a	n/a	n/a	n/a	
Miscellaneous Computing Devices					
Mi-Fi (Mobile Wi-Fi) devices	n/a	n/a	n/a	n/a	
Wi-Fi Dongles	n/a	n/a	n/a	n/a	

10.5 Service Coverage Periods and Service Levels applicable in Tower E

The specific Service Coverage Periods applicable to the Break-fix activities in Tower E are set out in Table E-3 below:

Table E-3: Service Coverage Periods Applicable to Tower E

Service Coverage Period	Period Covered
WFH	07:00 to 17:00 on weekdays only, public holidays are excluded.
Basic	06:00 to 19:00 on weekdays regardless of whether the weekday falls on a public holiday or not.
Standard	06:00 to 21:00 on all days, including Saturdays, Sundays and public holidays.
Extended	06:00 to 00:00 on all days, including Saturdays, Sundays and public holidays.
Premium	24x7x365 (at all times).

The specific Service Levels applicable to the Break-fix activities in Tower E are set out in Table E-4 below. Elapsed time to service restoration is only counted during the Service Coverage Period applicable to the device. If, to restore services to a Device, the Break-fix activities required include the need to backup and/or restore user data from/to the Device, the time taken to perform the backup and/or restore activities will be excluded from the elapsed time for the purpose of calculating Service Levels.

The detailed operation of Service Credits relating to Service Level failures is set out in Schedule C (Service Levels) of the *Master Services Agreement End-user Device Support Services*.

Table E-4: Service Levels Applicable to Tower E Break-fix Service Level Classes

Service Level Class	Time to Repair
Bronze	Service restoration within 12 (twelve) hours of the ticket being assigned to Service Provider.
Silver	Service restoration within 8 (eight) hours of the ticket being assigned to Service Provider
Gold	Service restoration within 4 (four) hours of the ticket being assigned to Service Provider.
Platinum	Service restoration within 2 (two) hours of the ticket being assigned to Service Provider.

Standard Chargeable Services Levels

Service	Time to Complete
Single Device IMACD	(One) 1 business day (completed on or before the same time of day as the request was made to the Service Provider on the next business day). If the request was made on a non-business day, the request will be regarded as having been logged at the start of the next business day.
2-10 Devices IMACD (Low Volume)	(Three) 3 business days.
11-50 Devices IMACD (Medium Volume)	(Five) 5 business days.
51-100 Devices IMACD (High Volume)	(Ten) 10 business days.
100+ Devices IMACD (Very High Volume)	To be negotiated based on complexity and specific needs.

10.6 **Volume Based IMACD**

To ensure cost-effective delivery of volume-based requests versus single IMACD requests, the Service Provider must adhere to the following requirements:

Volume Metrics: The Service Provider must establish and implement volume metrics to accurately measure and track the quantity of IMACD requests processed. These metrics should allow SARS to monitor the efficiency and cost-effectiveness of the IMACD services provided.

Tiered Pricing: The Service Provider must offer tiered pricing structures for IMACD services, providing discounts for bulk requests to incentivize cost-effective and efficient management of volume-based IMACD tasks. The pricing structure should be clearly defined and transparent, enabling SARS to easily understand and compare costs between single and volume-based requests.

Process Optimization: The Service Provider must continuously review and optimize the IMACD processes, leveraging best practices from the ITIL framework to streamline operations and improve cost efficiency. This may include identifying opportunities for automation, implementing standardized procedures, and refining workflows to reduce redundancies and enhance overall productivity.

Reporting and Analytics: The Service Provider must provide regular reporting and analytics on the performance of IMACD services, including data on volume-based requests, cost savings achieved through discounts, and other relevant performance indicators. This information will enable SARS to assess the effectiveness of the volume-based IMACD rates and identify areas for improvement.

10.7 **Service Provider Technical Personnel**

At Commencement Date and throughout the Term, Service Provider technical personnel assigned to the SARS account must be in possession of the following minimum qualifications and experience when dealing with the corresponding technologies/services:

Personnel Role	Service Provider Personnel Required certifications/experience
End-user Computing Devices	A+ and OEM certification and at least 2 (two) years of experience.
Multifunction Printing Devices	A+ and OEM certification and at least 2 (two) years of experience.
Service Management Services	Latest ITIL Foundation Certification
Project Management Services	Project Management Certification and at least 5 (five) years of experience.

© South African Revenue Service 2026

Generally, all technical personnel must be familiar with basic service management processes, preferably a foundational level qualification and must possess the basic skills described in Table E-6. The Service Provider must ensure that for each SARS site, a qualified End-user Device support technician is able to provide services for the equipment located at that SARS site within the specified Service Levels.

The technical personnel should have expertise in network infrastructure and security, data backup and recovery procedures, and the latest trends and developments in end-user device technology. Technical personnel should also stay up to date with the latest training and education to ensure they can provide the best possible support to SARS end-users, while also adhering to organisational processes, policies and guidelines.

Table E-6 Service Provider Personnel Foundational Skills and Knowledge

Support Personnel Skills	Description
Technical Skills	Ability to diagnose and troubleshoot hardware issues, perform upgrades and repairs, configure and install software, and maintain inventory of devices. Familiarity with relevant tools, technologies, and software such as Active Directory, SCCM, Intune and Remote Desktop Services.
Communication Skills	Excellent communication skills, both written and verbal, with the ability to explain technical issues to non-technical users.
Teamwork	Ability to work effectively in a team environment, collaborating with other support personnel and SARS IT staff to resolve issues and complete projects.
Customer Service	Strong customer service orientation, with a focus on providing a positive end-user experience.
Attention to Detail	Strong attention to detail, with the ability to document procedures and maintain accurate inventory records.
Physical Requirements	Ability to lift and move equipment weighing up between 20 and –30 kg, and the ability to work in cramped or awkward spaces.

The Service Provider must ensure sufficient personnel are provided to meet the contractual performance standards, including the Service Levels, with a minimum dependency of seats provided by SARS. Consideration will be given to seating requests (To a maximum of two seats) at Platinum sites only. The Service Provider must monitor the utilization of the allocated Seats and must submit a request to SARS for the increase/decrease of the number of Seats as and when required. SARS will review the request for the additional/reduced requirement and if approved will adjust the provisioning accordingly within 30 (thirty) days from the date of the request. The Service Provider will not be excused from its obligations to meet the Service Levels due to an inadequate number Seats available to the Service Provider during the Term.

10.8 Professional Services Scope of Services

The Service Provider agrees to provide professional services to SARS on request, in accordance with the personnel rates specified in its response to the RFP. The professional services may cover any area related to the End-user Support Services, as defined in the RFP.

10.9 Transition of Services

As part of the transition of services to the new Service Provider, the following critical resources (Full Time Engineers/Resources) are required at the Commencement Date:

- **End-user Support Service desk engineers (20).**
- **Problem Management coordinators (3).**
- **Technical Logistics Co-Ordinator (1).**
- **Senior Endpoint engineers (6).**

The Service Provider is encouraged to transfer the critical resources from the current Service Provider to minimize operational risk.

South African Revenue Service

ATTACHMENT A: PROCESS FLOW DIAGRAMS

The process flow diagrams set out in this Attachment are set out to provide high-level guidance to the Bidder and do not contain all activities required for every process.

The Bidder must read these process flow diagrams in conjunction with provisions set out in *Schedule B of the Master Services Agreement End-user Device Support Services* and this *Business Requirements Specification* and supplement them with any activities that are regarded as necessary in terms of industry best practice to meet the required outcomes.

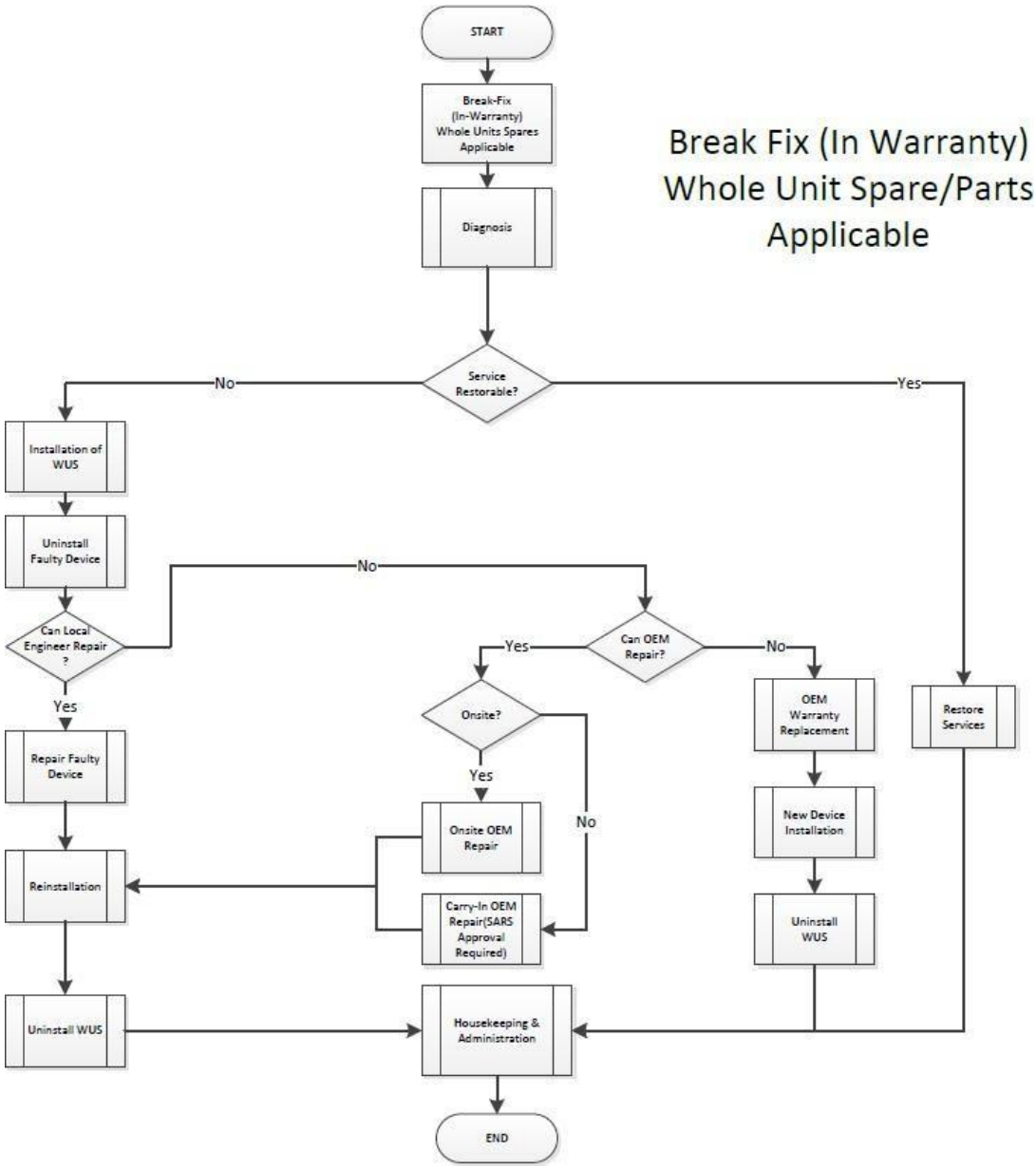
The Bidder must include all activities as described above in its costing and pricing for the services. It is the obligation of the Bidder to transparently reflect all activities, both from the diagrams and supplementary additions, in the costing structure, leaving no room for future financial uncertainty. Where an activity is not relevant to a specifically to Tower E the process flow will be reviewed and finalised during the Transition.

© South African Revenue Service 2026

1 IN-WARRANTY BREAK-FIX PROCESS (WUS APPLICABLE)

The flowchart set out immediately below describes the process to be followed for the repair of In-warranty device service for devices that are required to be repaired onsite (Carry-in to OEM Repair only on SARS approval) and, if required to meet the Service Levels, the provision of a WUS. The Bidder must supply a monthly rate to facilitate co-ordination of warranty repair. No additional charges would be payable by SARS to effect the repair other than the monthly rate.

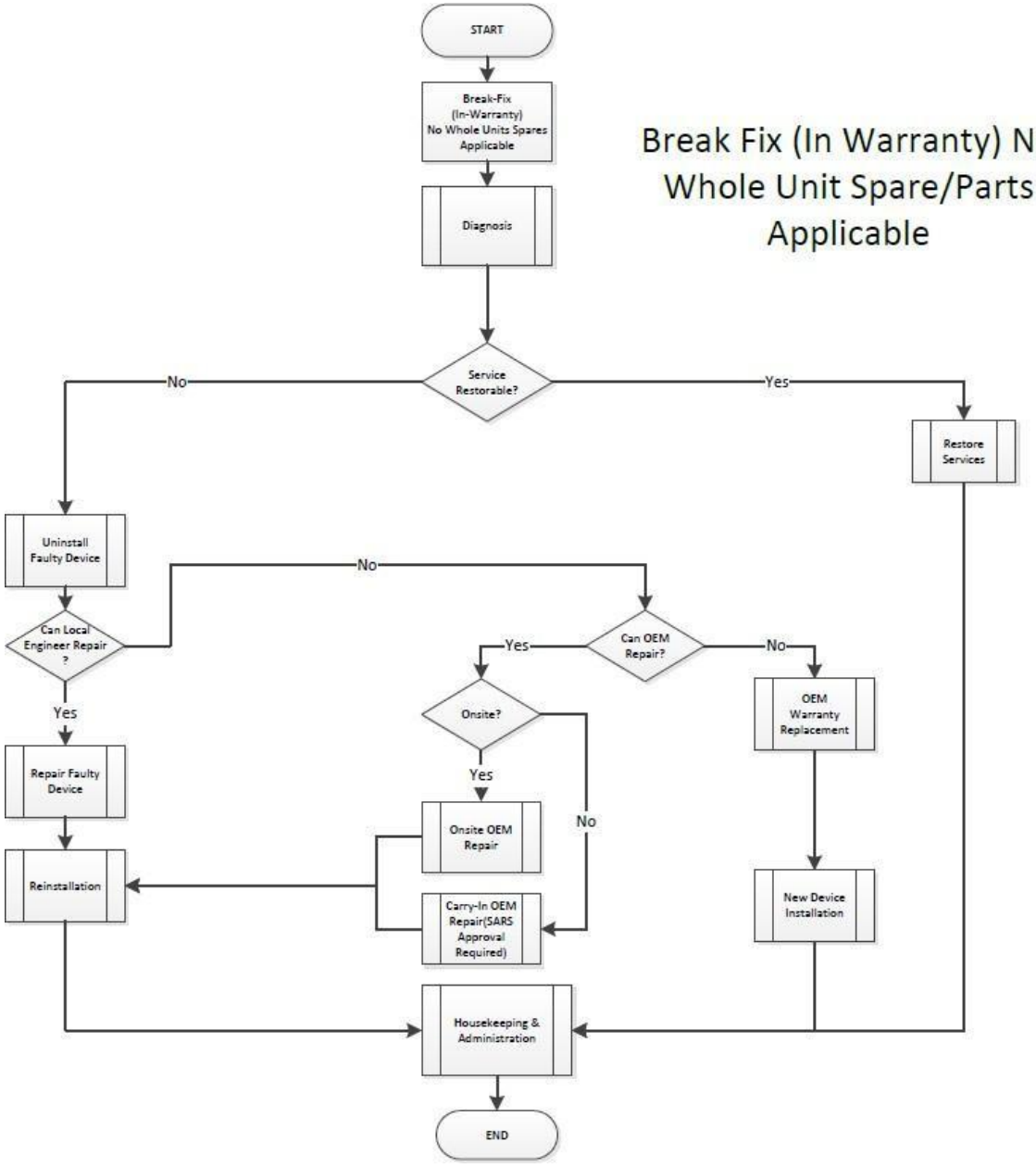
Diagram 1.1 Break Fix (in warranty)



2 IN-WARRANTY BREAK-FIX PROCESS (WUS NOT APPLICABLE)

The flowchart set out immediately below describes the process to be followed for the repair of In-warranty devices that are required to be repaired onsite (Carry-in to OEM Repair only on SARS approval), where no WUS is applicable. The Bidder must supply a monthly price to facilitate co-ordination of warranty repair. No additional charges are payable by SARS to effect the repair other than the monthly rate.

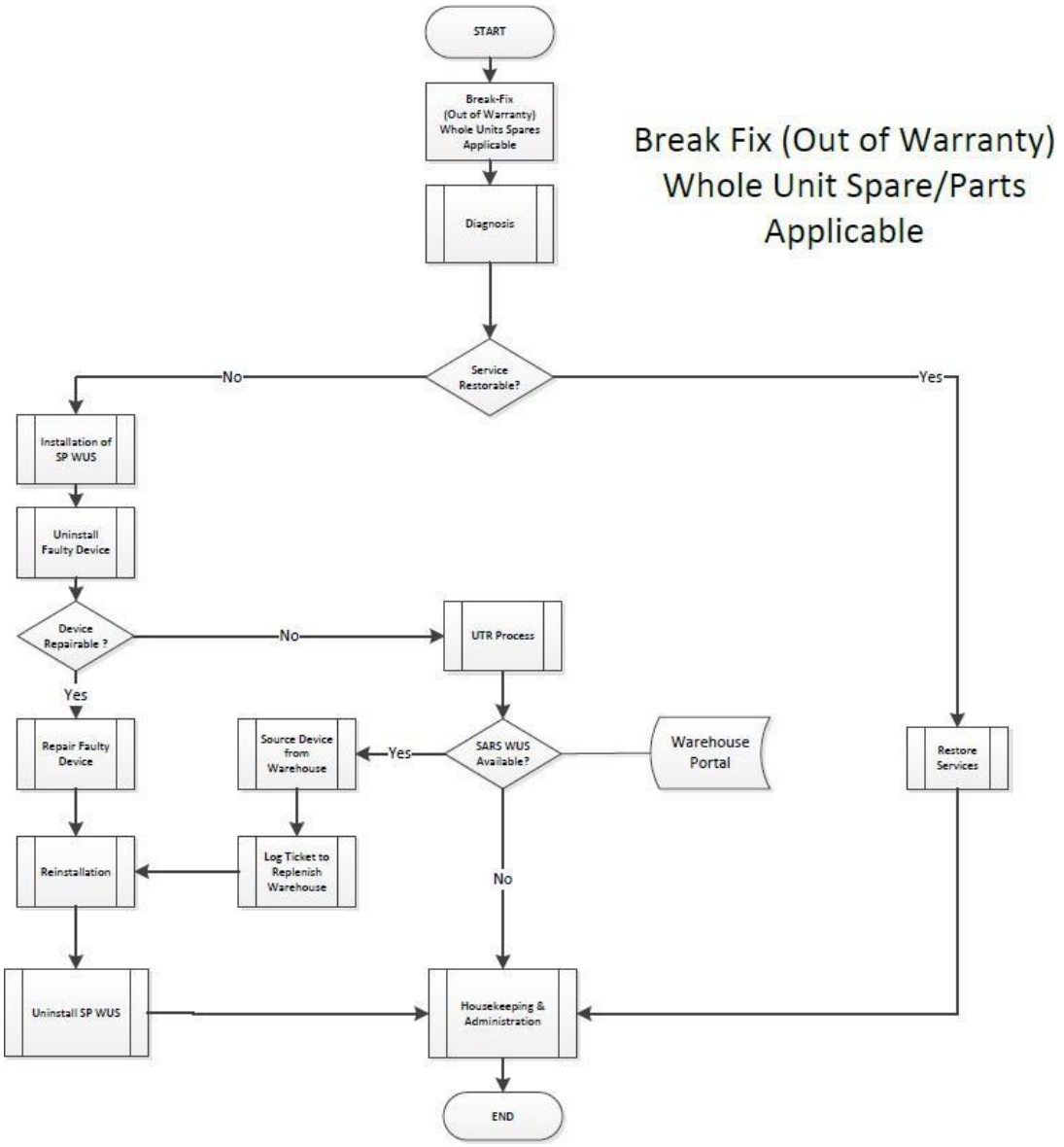
Diagram 2.1 Break Fix (in-warranty)



3 OUT-OF-WARRANTY BREAK-FIX PROCESS (WUS APPLICABLE)

The flowchart set out immediately below describes the process to be followed for the repair of Out-of-warranty devices that are required to be repaired onsite and, if required to meet the Service Levels, the provision of a WUS. The Bidder must provide a monthly rate. No additional charges are payable by SARS other than the monthly charge.

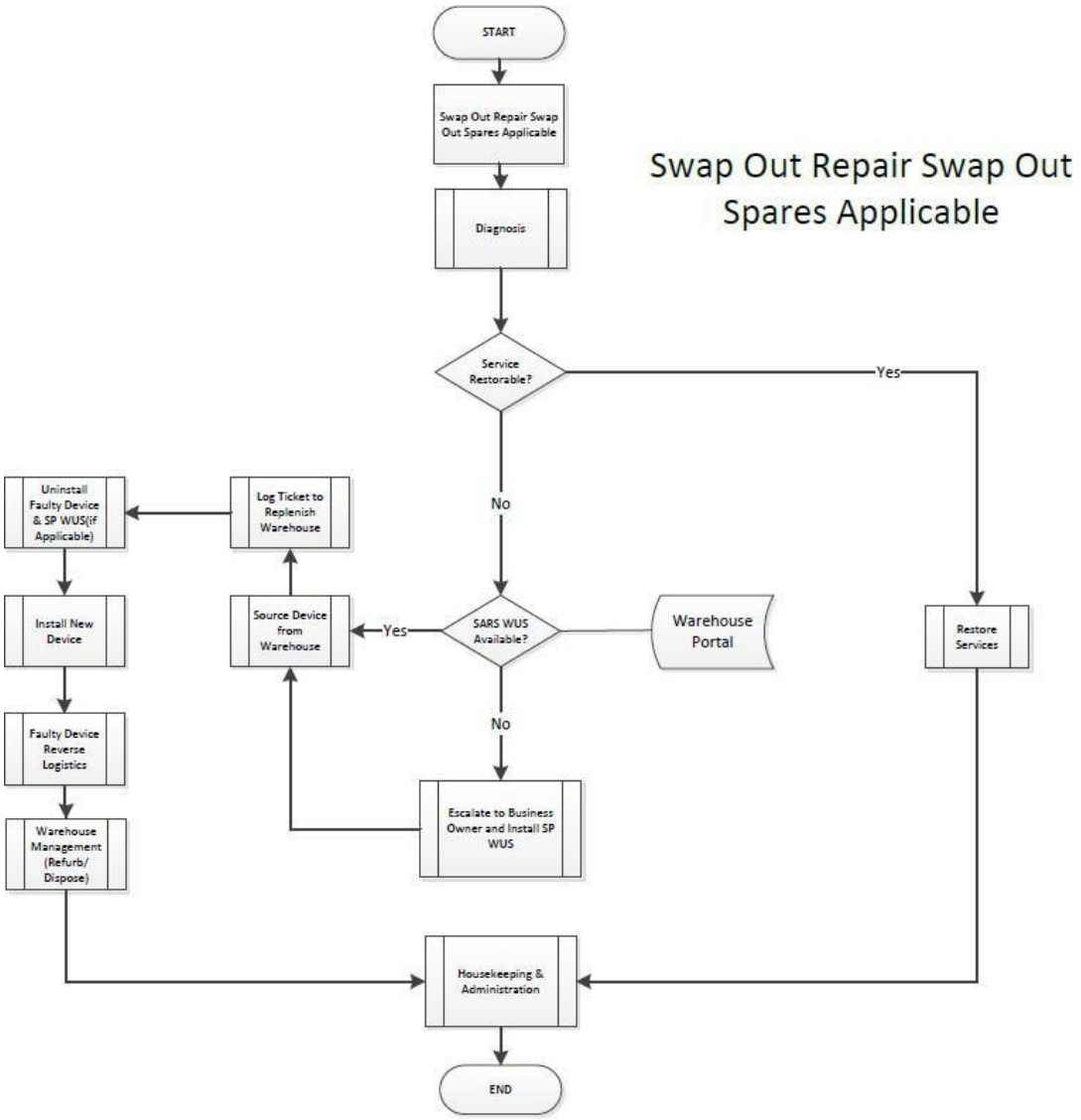
Diagram 3.1 Break Fix (out of warranty)



4 SWAP-OUT REPAIR PROCESS

The flowchart set out immediately below describes the process to be followed for the Swap-out of non-functioning devices with a WUS. The Bidder must supply a monthly price to effect the repair. No additional charges are payable by SARS to effect the Swap-out other than the monthly rate.

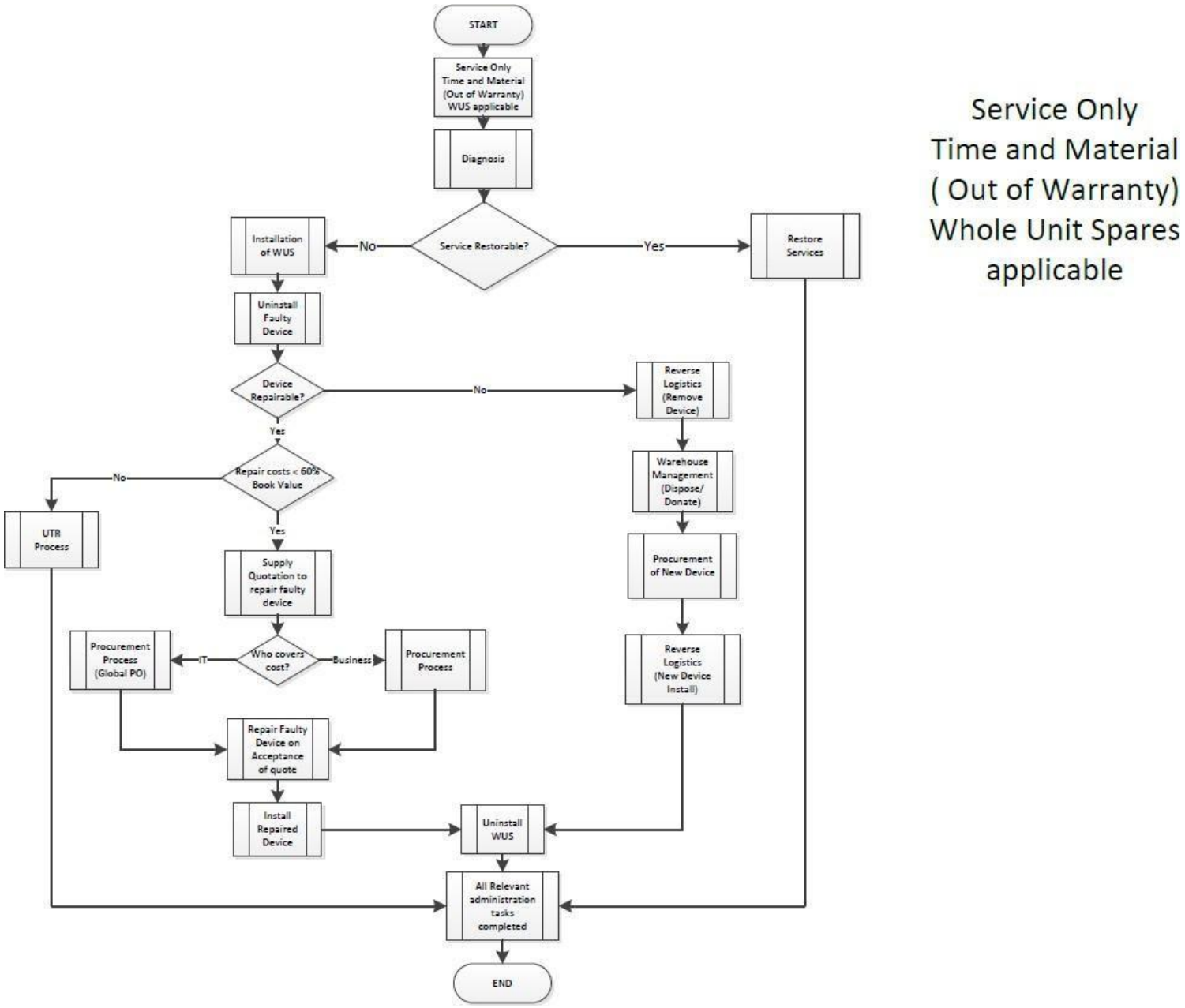
Diagram 4.1 Swop-Out Repair Process



5 SERVICE-ONLY – TIME AND MATERIAL PROCESS (WUS APPLICABLE)

The flowchart set out immediately below describes the process to be followed for the repair of Out-of-warranty devices that are fully covered by the monthly rate and, if required to meet the Service Levels, the provision of a WUS. The Bidder must supply a monthly rate to co-ordinate the repair. The additional amount that will be chargeable on SARS's acceptance of the quote obtained by the Service Provider must be passed through without margin and will be chargeable in addition to the monthly rate.

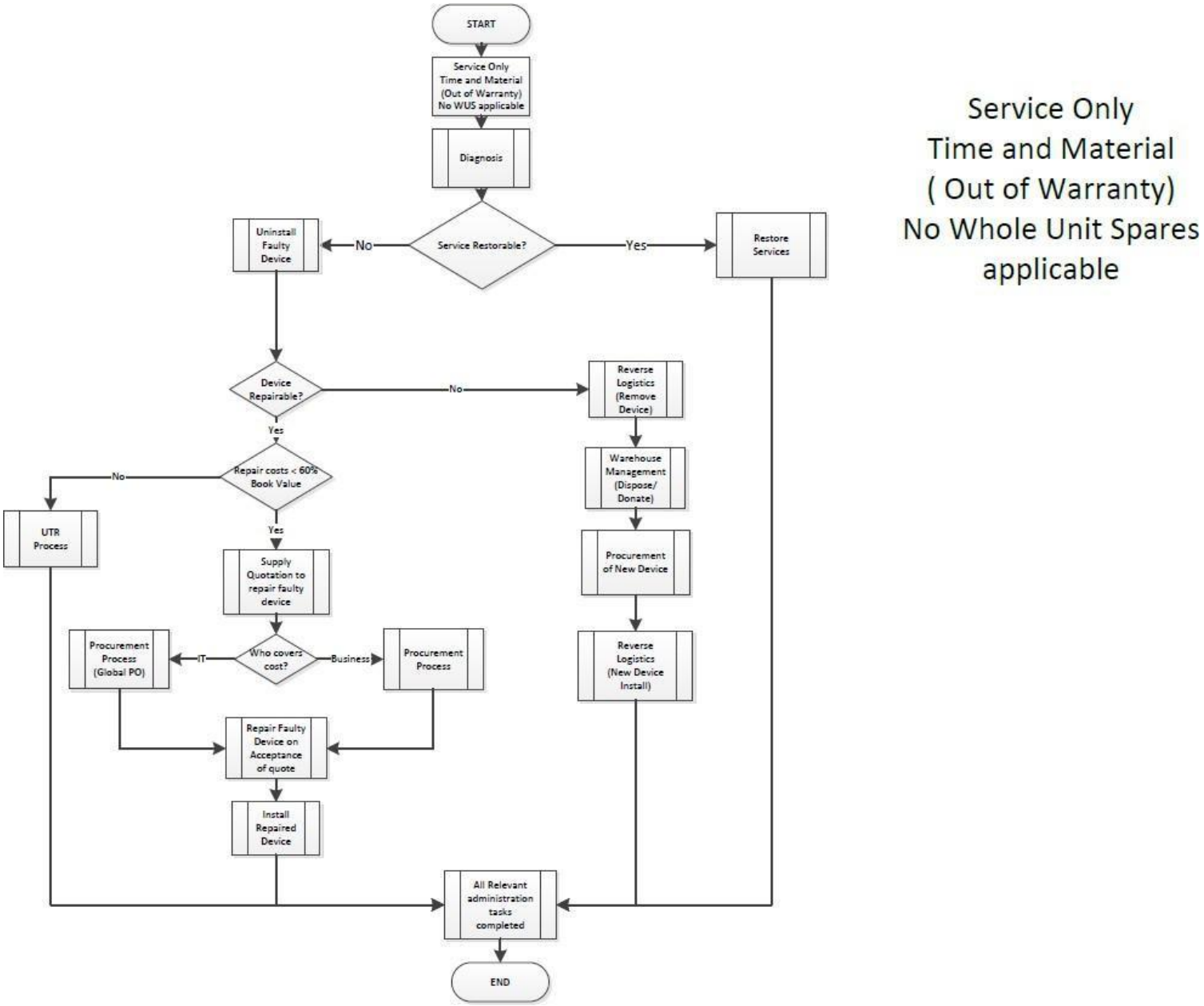
Diagram 5.1 Service Only Time and Material (out of warranty)



6 SERVICE-ONLY–TIME AND MATERIAL PROCESS (WUS NOT APPLICABLE)

The flowchart set out immediately below describes the process to be followed for the repair of Out-of-warranty devices that are not fully covered by the monthly rate. The Bidder must supply a monthly rate to co-ordinate the repair. The additional amount that will be chargeable on SARS's acceptance of the quote obtained by the Service Provider must be passed through without margin and will be chargeable in addition to the monthly rate.

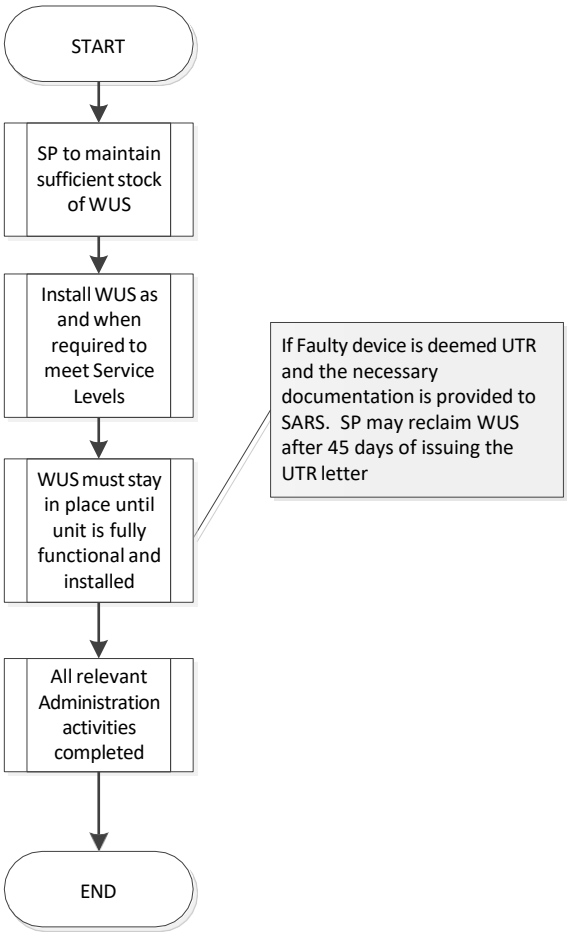
Diagram 6.1 Service Only Time and Material (out of warranty)



7 SERVICE PROVIDER-PROVIDED WUS PROCESS

The flowchart set out immediately below describes the process to be followed for the provision of WUSs by the Service Provider. This process must be read together with the preceding process descriptions that include the provision of Whole Unit Spares.

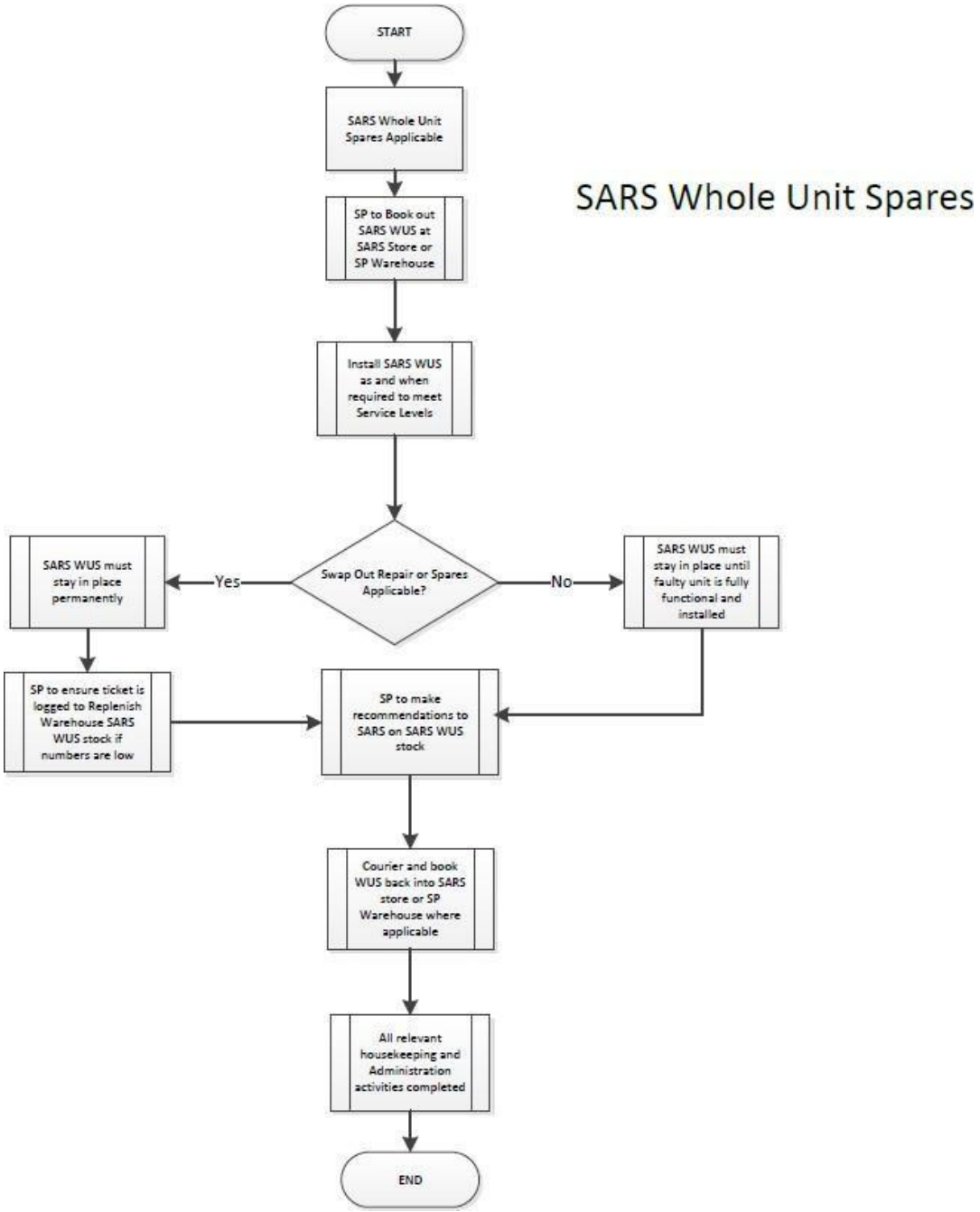
Diagram 7.1 Service Provider (WUS)



8 SARS-PROVIDED WUS PROCESS

The flowchart set out immediately below describes the process to be followed for the provision of WUSs by SARS. This process must be read together with the preceding process descriptions that include the provision of WUSs.

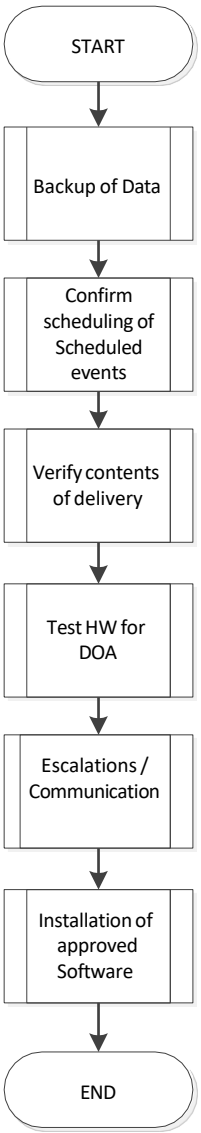
Diagram 8.1 SARS Provided WUS Process



9 PRE-PRODUCTION PREPARATION/STAGING PROCESS

The flowchart set out immediately below describes the process to be followed for the pre-production preparation/staging of devices. This process is referred to in the process descriptions that follow. This service is to be rendered as a Standard Chargeable Service.

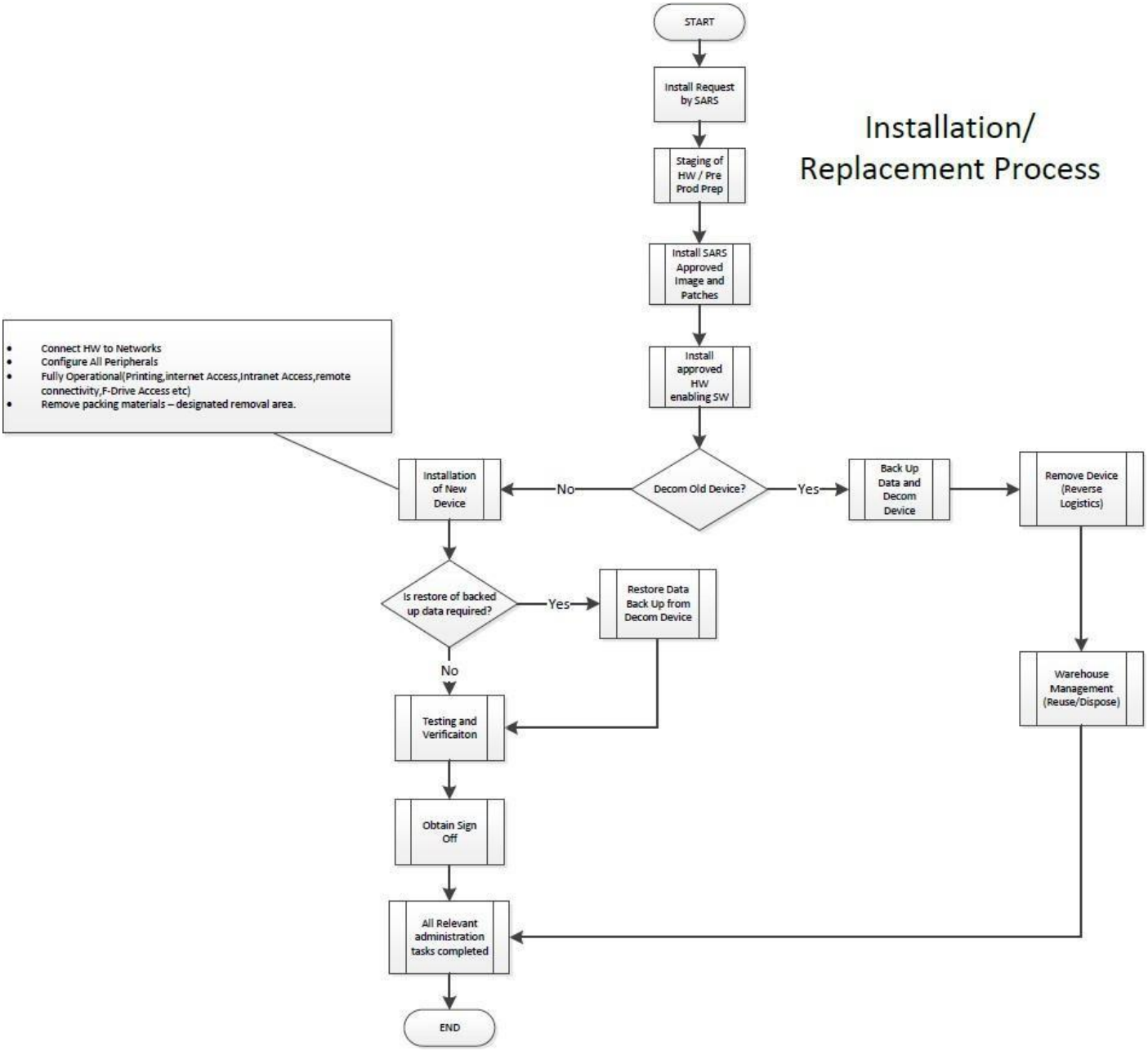
Diagram 9.1 Pre-Prod Preparation/ Staging



10 INSTALLATION/REPLACE PROCESS

The flowchart set out immediately below describes the process to be followed for the installation of devices. This service is to be rendered as a Standard Chargeable Service.

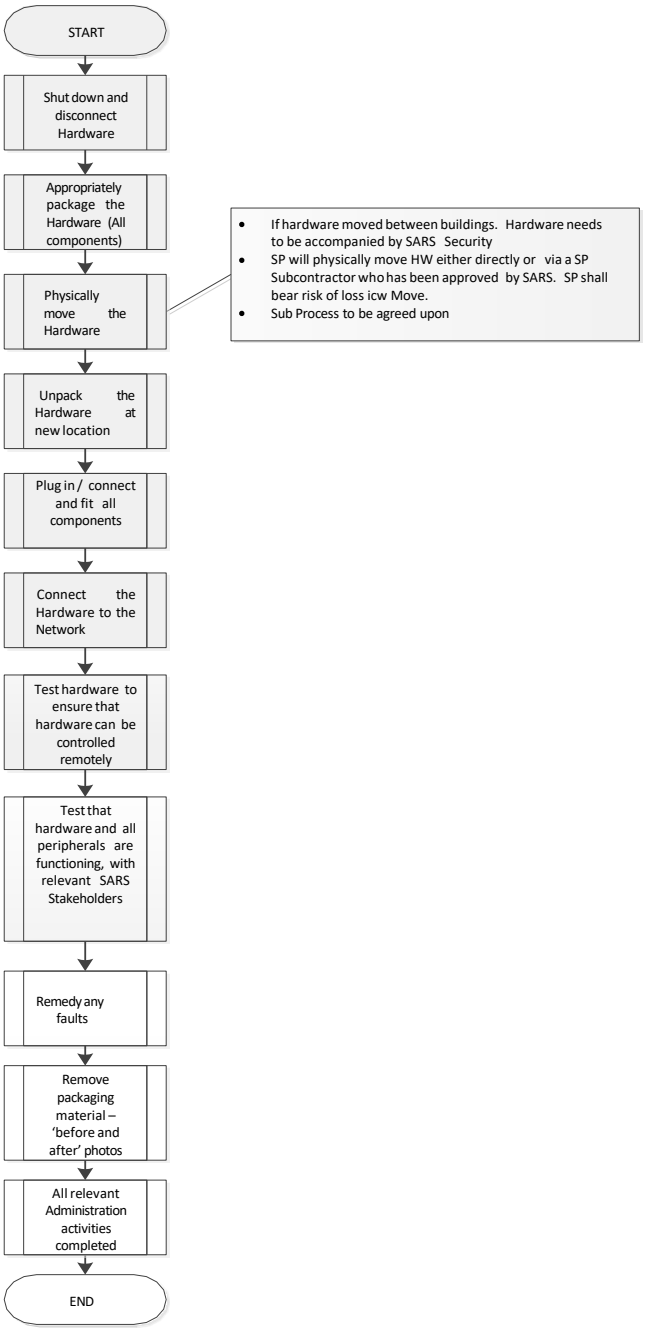
Diagram 10.1 Installation/Replacement Process



11 MOVE PROCESS

The flowchart set out immediately below describes the process to be followed for the move of devices. This service is to be rendered as a Standard Chargeable Service. Service Provider must ensure equipment is handled in line with OEM specifications whilst in transit. In the event of damage, the Service Provider will be liable.

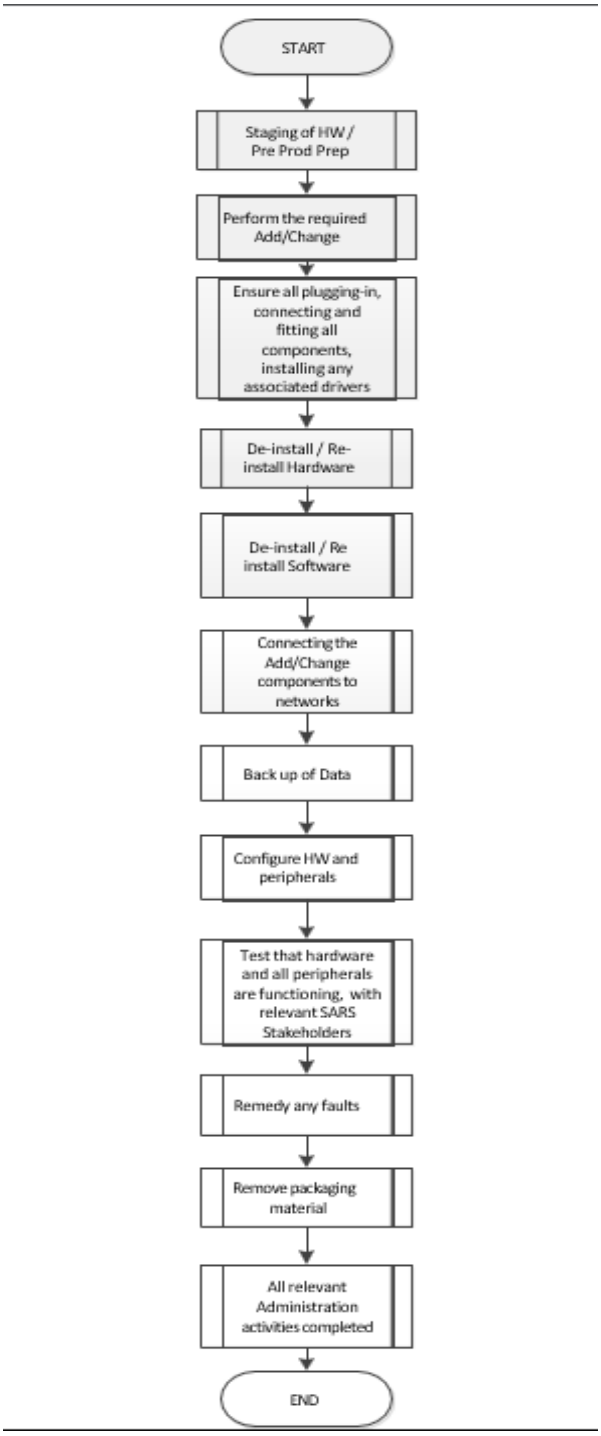
Diagram 11.1 Move Process



12 ADD/CHANGE PROCESS

The flowchart set out immediately below describes the process to be followed for the addition or change of devices. This service is to be rendered as a Standard Chargeable Service.

Diagram 12.1 Add/Change

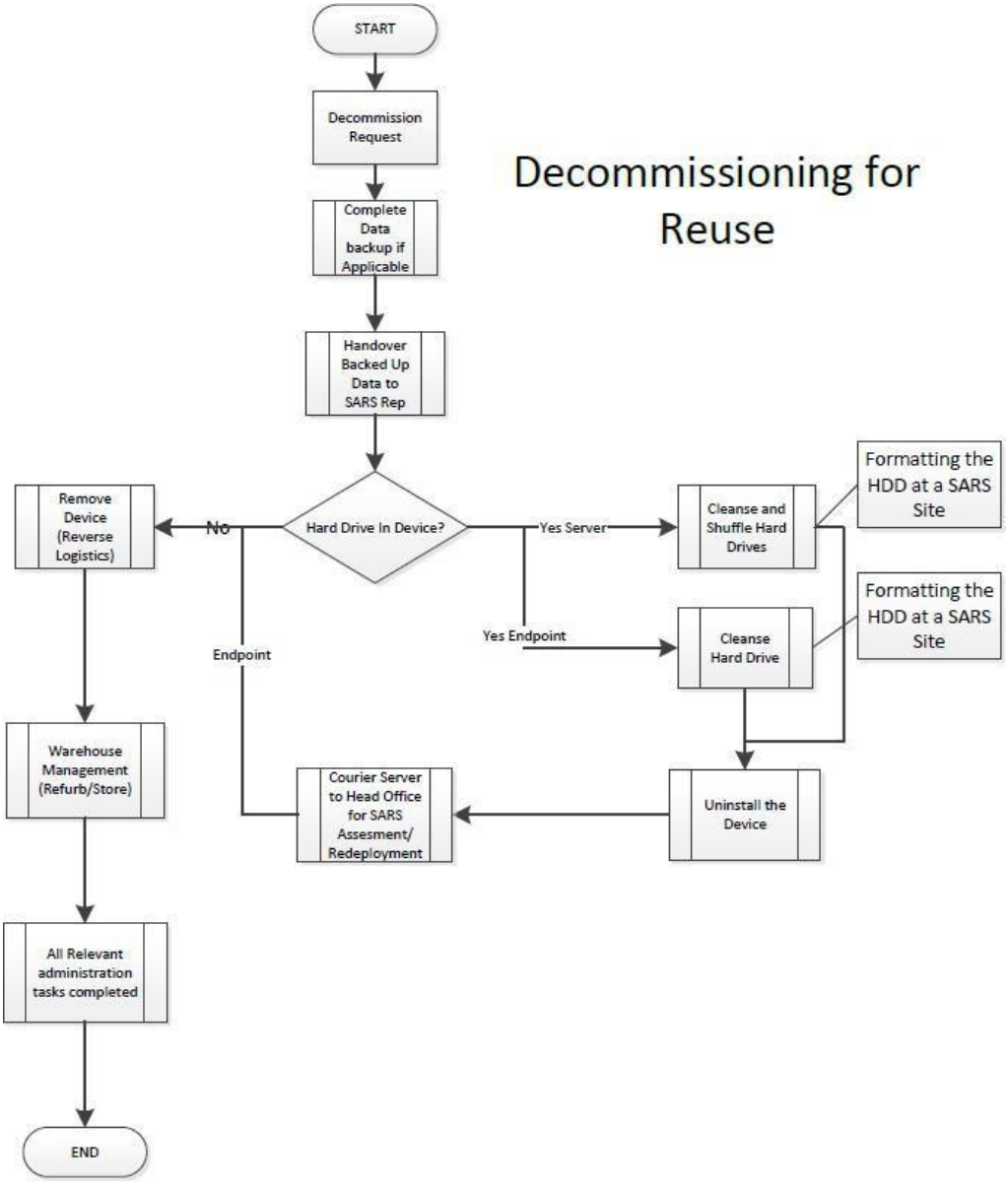


© South African Revenue Service 2026

13 DECOMMISSIONING FOR RE-USE PROCESS

The flowchart set out immediately below describes the process to be followed for the decommissioning of devices for re-use. This service is to be rendered as a Standard Chargeable Service.

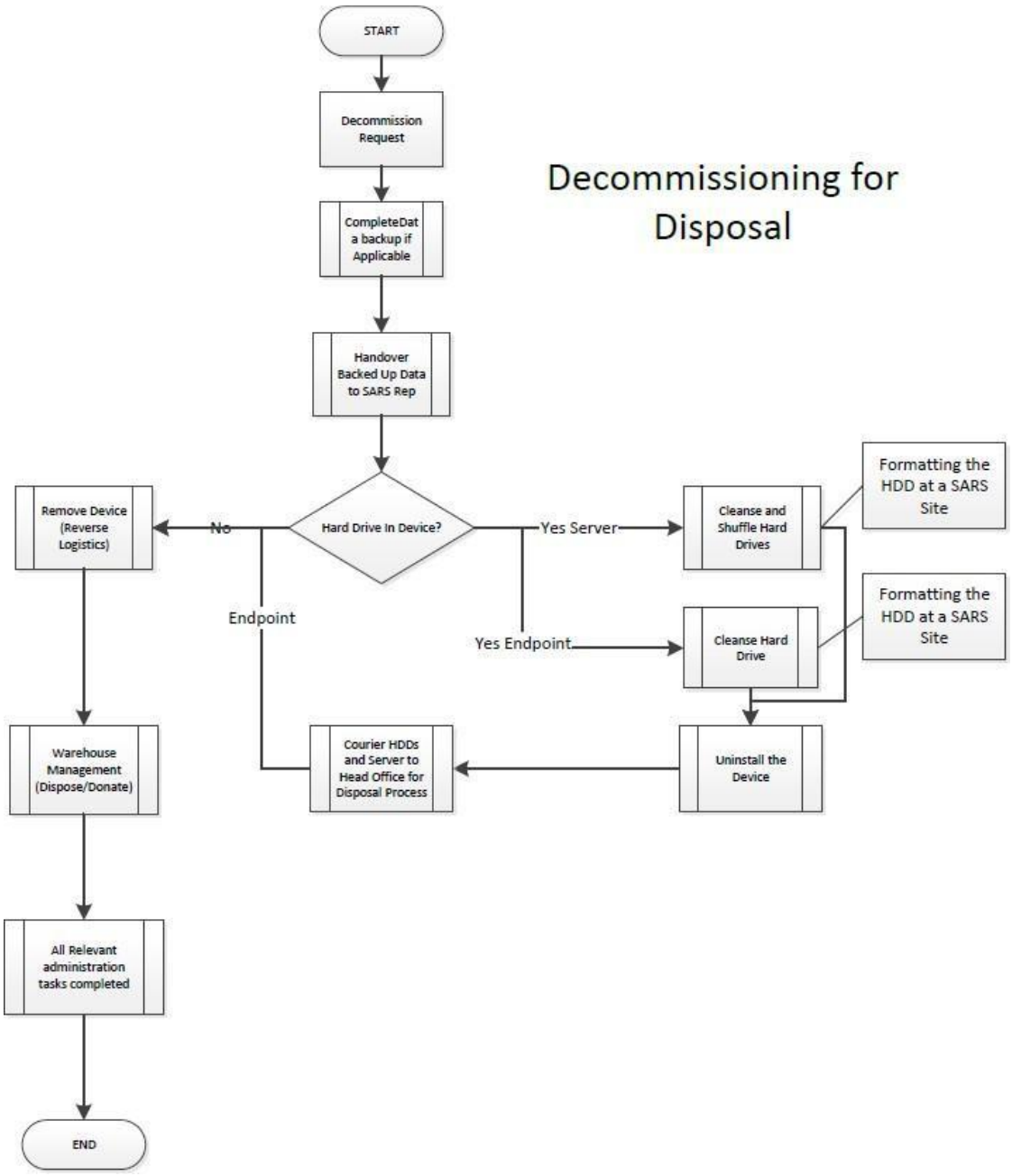
Diagram 13.1 Decommissioning for re-use process



14 DECOMMISSIONING FOR DISPOSAL PROCESS

The flowchart set out immediately below describes the process to be followed for the decommissioning of devices for disposal. This service is to be rendered as a Standard Chargeable Service.

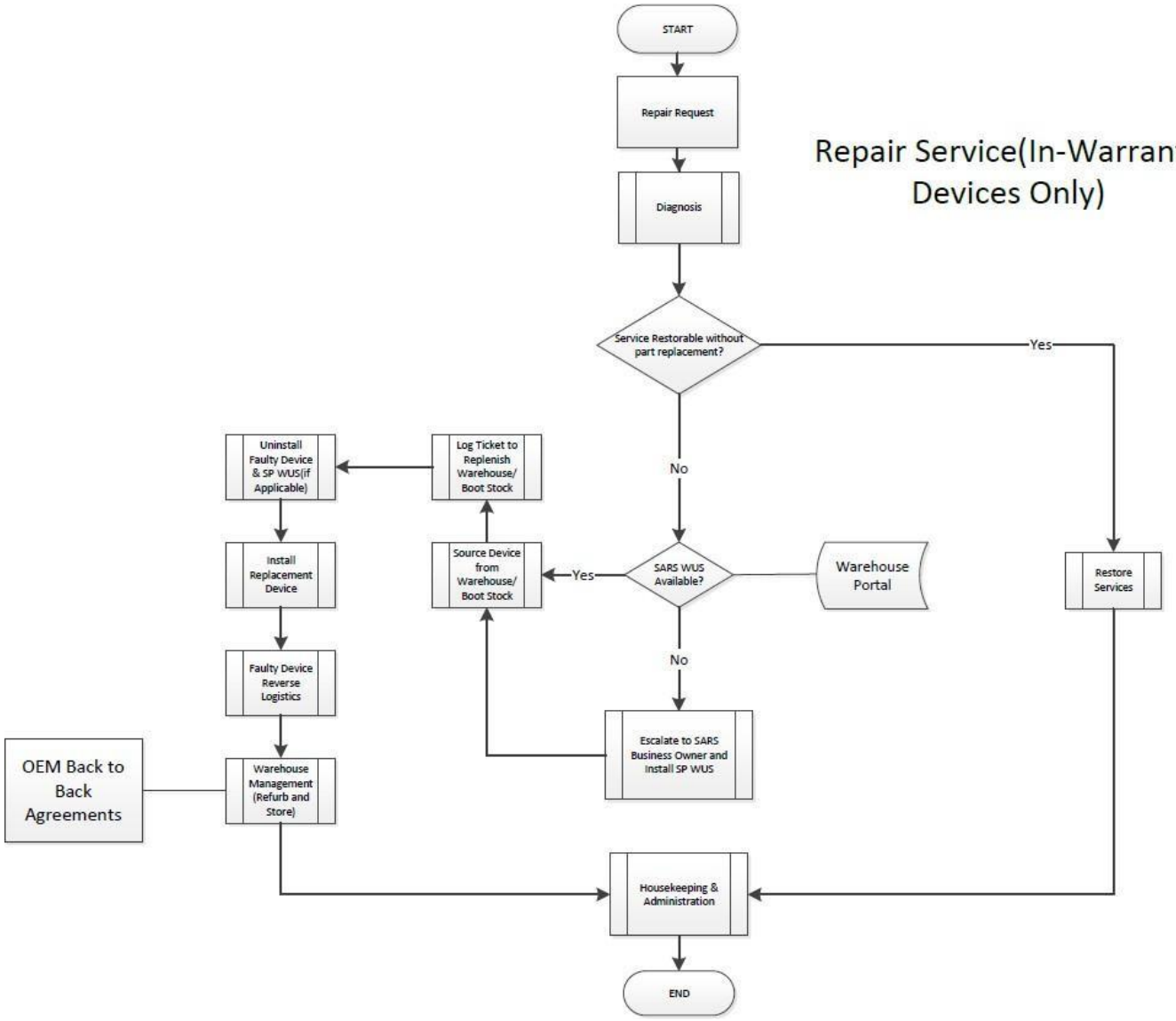
Diagram 14.1 Service Only Time and Material (out of warranty)



15 REPAIR PROCESS

The flowchart set out immediately below describes the process to be followed for the repair of end-user devices. This service is to be rendered as a Standard Chargeable Service for In-Warranty end-user devices only.

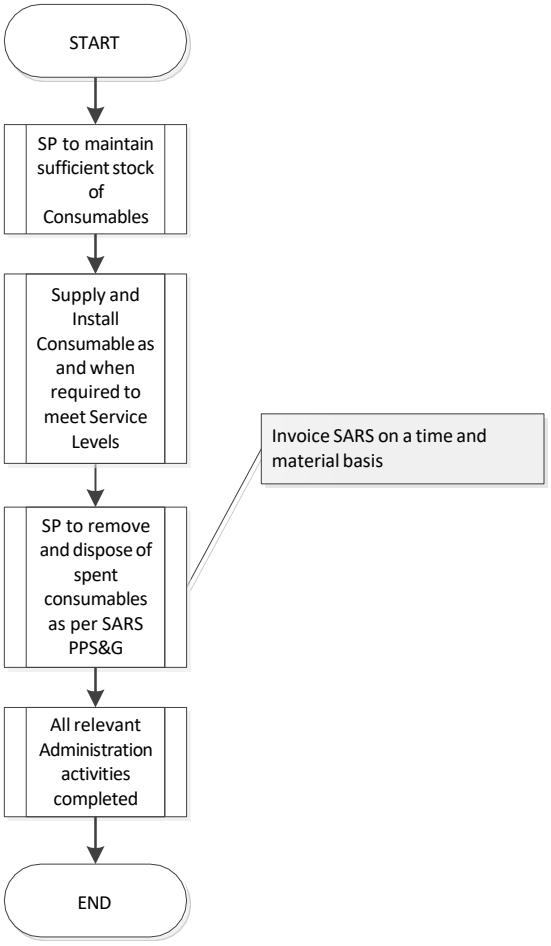
Diagram 15.1 Repair Process (end-user devices: in-warranty only)



16 INSTALL SERVICE PROVIDER-PROVIDED CONSUMABLE PROCESS

The flowchart set out immediately below describes the process to be followed for the provision of Service Provider provided consumables. This service is to be rendered as a Standard Chargeable Service.

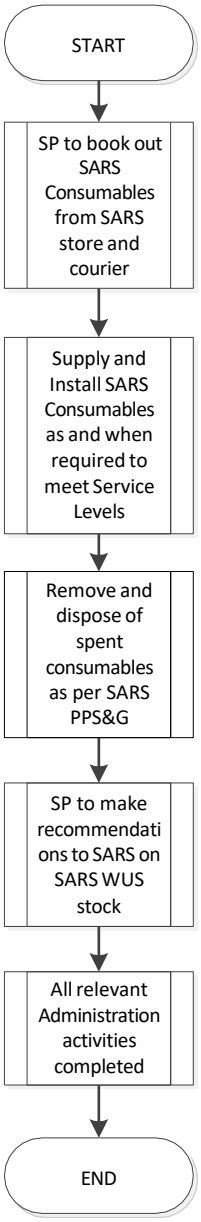
Diagram 16.1 Install Service Provider- Provided Consumables



17 INSTALL SARS-PROVIDED CONSUMABLES PROCESS

The flowchart set out immediately below describes the process to be followed for the provision of SARS-provided consumables. This service is to be rendered as a Standard Chargeable Service.

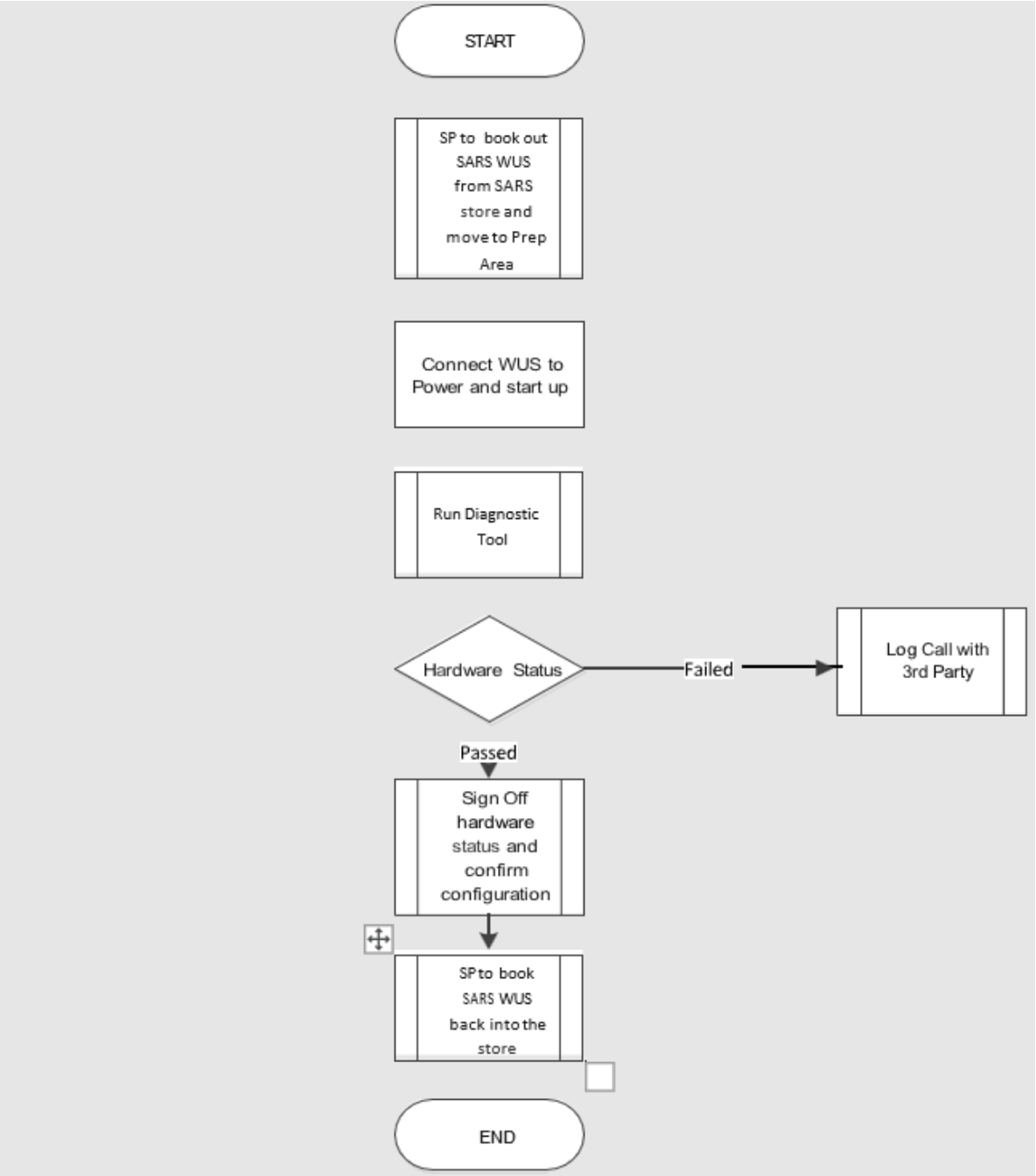
Diagram 17.1 Install SARS-provided consumables process



18 DELIVERY ACCEPTANCE TEST

The flowchart set out immediately below describes the process to be followed for the provision of Delivery Acceptance Test services. This service is to be rendered as a Standard Chargeable Service.

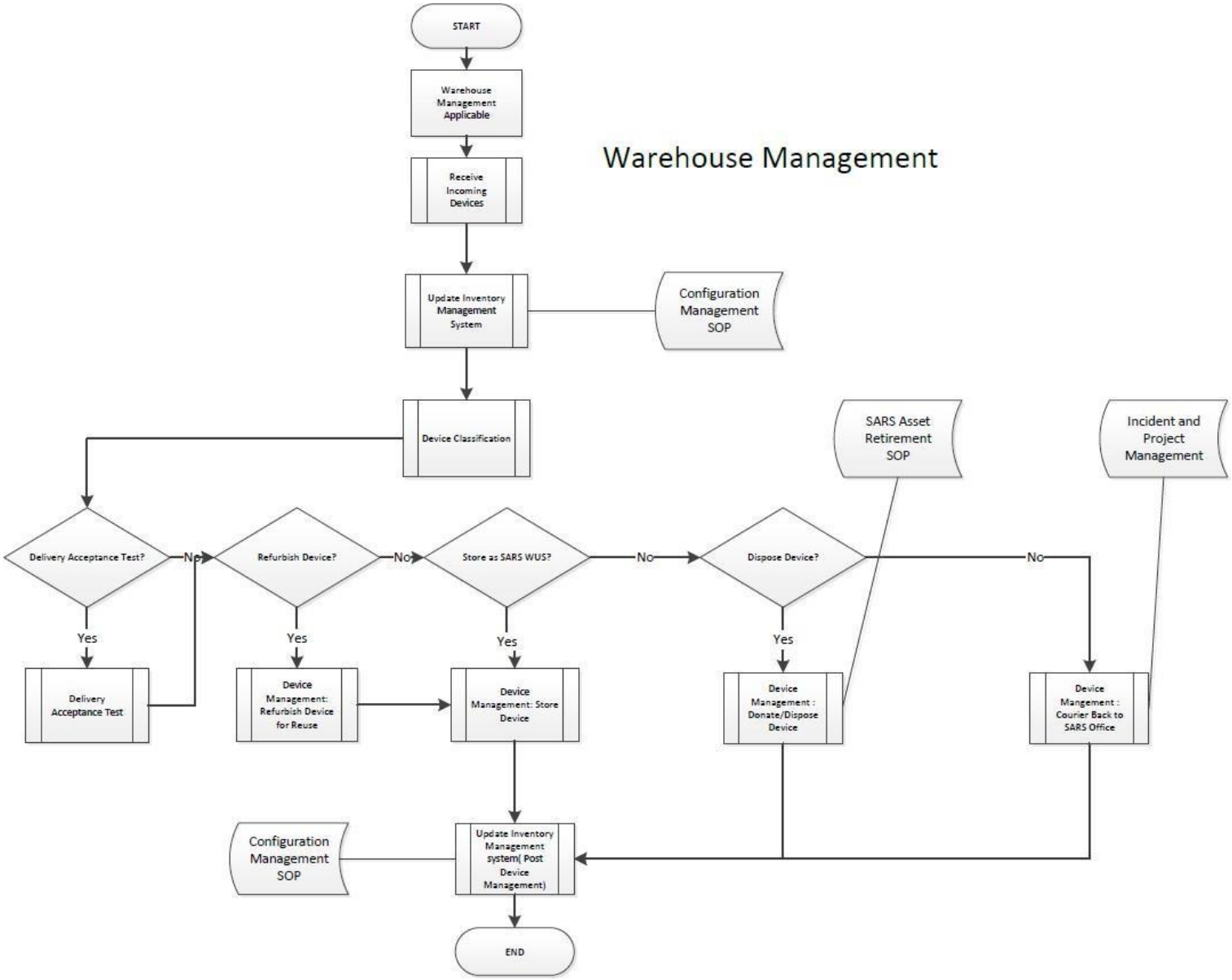
Diagram 18.1 Delivery Acceptance Test



19 WAREHOUSE MANAGEMENT PROCESS

The flowchart set out below describes the process to be followed for the management of warehouse services pertaining to device storage, sale, refurbishment, redeployment, and disposal. This service will be rendered as a standard chargeable. This charge will be proportional to the volume of devices actively managed within the warehouse.

Diagram 19.1 Warehouse Management Process



20 REVERSE LOGISTICS PROCESS

The flowchart set out below outlines the process to be followed for the reverse logistics of devices, encompassing the collection, refurbishment, redeployment, or disposal stages. No additional charges are payable by SARS other than the existing monthly charges and this process is designed to complement all above-mentioned processes.

Diagram 20.1 Reverse Logistics Process

