

**TENDER REFERENCE: RFP 04-2026**

**TENDER NAME: THE APPOINTMENT OF A SERVICE PROVIDER FOR A CUSTOMER INSIGHTS PLATFORM FOR A PERIOD OF THREE (3) YEARS.**

Question #	QUESTION/S	ANSWER
1.	<p>What is the name of the current platform with the licenses expiring? This will enable our migration planning for the files and dashboard designs</p> <p>Is there any flexibility in the go live date of 11 October, with the current licenses expiring?</p> <p>Does SARS foresee having this RFP awarded by end July? Doing this leaves 10 weeks for delivery of all 6 phases by 11 October 2026.</p>	<p>The bidder is required to propose a suitable platform that fully meets SARS' requirements as outlined in the published Business Requirements Specification (BRS).</p> <p>This is outlined in the relevant sections for the migration planning and dashboard configuration requirements, namely; 4.9. Data Migration, 6. Asset Inventory and 9. Reporting and Metrics</p> <p>If further clarification is required, it should be submitted through the formal tender communication platform.</p> <p>The go-live cannot be extended as the current service provider's contract ends 11 October 2026. As such, to ensure continuity of business operations, the new customer insight platform should be implemented by 11 October 2026.</p>
2.	<p>1. When do you plan to shortlist bidders for demos?</p> <p>2. Do you expect to have the platform fully ready by? Is it 11 October to ensure fluidity?</p>	<p>1. Should SARS determine that a system demonstration is required, a formal communication will be issued to bidders who have successfully passed the technical evaluation stage.</p> <p>2. 11 October is the go-live date, please see the implementation requirement as set out in the BRS. Bidders are required to propose a solution that aligns with the requirements as documented</p>
3.	<p>If a cloud solution is suggested - is the RSA data residency a requirement? i.e. can the cloud provider be US/EU based?</p>	<p>The BRS does not prescribe a specific hosting location.</p> <p>However, bidders must ensure that their proposed solution complies fully with the data protection, security, and compliance requirements outlined in the BRS.</p>
4.	<p>What was the reason for cancelling the previous request?</p>	<p>The cancellation of the previous tender was due to material irregularity in the tender process as per Section 2.4.11 of the Supply Chain Policy, May 2023.</p>
5.	<p>Question: The B-BBEE points table only shows points for EME or QSE bidders. What point allocations are applicable to a Large Enterprise (LE) bidder?</p>	<p>The allocation of points specifically for EMEs and QSEs is intentional, aimed at promoting and supporting these categories of entities. While Large Enterprises (LEs) are not excluded from the evaluation process, they are not eligible for the points reserved for EMEs and QSEs and will therefore be assessed only against the remaining applicable criteria.</p>



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6.	Should the platform be South African-based?	The BRS does not prescribe a specific hosting location. However, bidders must ensure that their proposed solution complies fully with the data protection, security, and compliance requirements outlined in the BRS.
7.	Is there a Business and Technical architecture view, mapping where this solution will fit in, including Data estate and WH. View of various current applications the current product integrates to, which this platform will replace? Is there a current CMS solution in SARS which this solution can integrate and leverage?	The integration, data environment, and system requirements are outlined in the BRS, particularly in Sections 4.8 and 11. The asset inventory section,6. also provides context on the types of data, systems, and touchpoints to be considered in the solution. SARS has not provided detailed internal architecture diagrams or system-level mappings as part of this briefing. Bidders are expected to propose solutions that meet the integration and interoperability requirements as defined in the BRS.
8.	3.2 Objectives, especially "Improve Decision Support" and "Support Proactive Service Improvement"; BRS 2 Business Requirement Summary; Main RFP 2.2.2–2.2.4  What business decisions do you wish you could make today that your current platform cannot support?	The BRS outlines current limitations including manual processing of qualitative data and fragmented use of separate modules. These limitations constrain SARS’s ability to generate timely, actionable insights, support integrated analysis, and link customer experience data with broader strategic research.  (Refer to Section 2: Business Requirement Summary and Section 3.2: Objectives)
9.	BRS 2 Business Requirement Summary; BRS 3.1 Scope; BRS 7 Risk Assessment; Main RFP 2.2.2–2.2.3  What is the current insight lifecycle end-to-end, and where exactly are the bottlenecks? What isn't connected that should be, is the speed from data to insight useful?	The BRS outlines the full feedback lifecycle requirements, including data collection, analysis, reporting, and service recovery.  Current limitations are described in the Business Requirement Summary, particularly relating to manual processing of qualitative data and fragmented use of modules, which impact the speed and integration of insight generation.  (Refer to Section 2: Business Requirement Summary, Section 4: Functional Requirements, and Section 7: Risk Assessment and Prioritization)
10.	Reporting and Dashboards; 9 Reporting and Metrics; 4.7 User and Access Management  What are the must-have dashboards by role, and what decisions/actions must each dashboard trigger?	The BRS specifies requirements for reporting and dashboards, including role-based dashboards, real-time visualisation, and AI-powered insight generation.



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		<p>Specific dashboard configurations and actions are not prescribed. Bidders are required to propose solutions that meet the reporting and dashboard requirements as defined.</p> <p>(Refer to Section 4.5: Reporting and Dashboards, Section 9: Reporting and Metrics, and Section 4.7: User and Access Management)</p>
11.	<p>Training &amp; Support; 3.2 Promote Organisational Adoption; 7 Risk Assessment (User Adoption &amp; Training Gaps); Main RFP Technical Criteria</p> <p>What does SARS expect for training and adoption—how will they measure capability transfer and ongoing support quality?</p>	<p>The BRS outlines requirements for training, adoption, and ongoing support, including flexible training delivery, support services, and platform optimisation.</p> <p>Bidders are required to demonstrate how their proposed solution supports training, adoption, and ongoing support in line with these requirements.</p> <p>(Refer to Section 4.10: Training, Adoption and Support, Section 3.2: Objectives, and Section 7: Risk Assessment and Prioritization)</p>
12.	<p>Scope</p> <p>Here is the list of identified user personas this Engagement and insights platform will service. Commercial/business users, Individual users, Tax agents and third parties, SARS employees. Please advise if we have missed any.</p>	<p>The BRS outlines the scope of users, including taxpayers, traders, employees, and other relevant stakeholders.</p> <p>Bidders should respond based on the defined scope and requirements. Any proposed solution should support all relevant user groups as required.</p> <p>(Refer to Section 3.1: Scope)</p>
13.	<p>Survey Design and Configuration</p> <p>Can you share some sample Surveys and campaigns recently conducted through the current platform. Please list out the user personas it was targeted towards and responses received.</p>	<p>SARS has not provided sample surveys or campaign data as part of this tender.</p> <p>Bidders should refer to the survey design and configuration requirements outlined in the BRS when preparing their proposals.</p> <p>(Refer to Section 4.1: Survey Design and Configuration)</p>



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14.	<p>Integration and Interoperability</p> <p>As per integration requirements, it should integrate to other SARS channels. Can you please list out all the SARS digital channels it needs to integrate the engagement and insights creation into. Section 4.8 suggests its eFiling, MobiApp, WhatsApp, USSD and the SARS website. Is that exhaustive list of Digital channels in scope?</p>	<p>The BRS provides examples of digital channels, including eFiling, MobiApp, WhatsApp, USSD, and the SARS website.</p> <p>Bidders are required to propose solutions that support integration with SARS digital channels as outlined in the BRS and should not assume that the examples listed are exhaustive.</p> <p>(Refer to Section 4.8: Integration and Interoperability)</p>
15.	<p>If this programme is successful in three years' time, what will have changed inside SARS that has not changed over the last five years? Is it about priority journeys, attitude understanding, usage, action, datapoint/quantitative/qualitative etc. integration, number of internal users, speed etc.?</p>	<p>The objectives are defined in Section 3.2 of the BRS. These include improving decision support, enabling proactive service improvement, enhancing efficiency, and strengthening integration and data-driven capabilities.</p> <p>Bidders should respond based on these stated objectives.</p> <p>(Refer to Section 3.2: Objectives)</p>
16.	<p>3.2. Objectives</p> <p>Where do you currently have the greatest blind spots in understanding user (taxpayer or agent) behaviour?</p>	<p>The BRS identifies limitations related to manual processing of qualitative data and fragmented data and system integration.</p> <p>Bidders are expected to propose solutions that address these limitations and improve SARS's ability to generate integrated, timely insights.</p> <p>(Refer to Section 2: Business Requirement Summary)</p>
17.	<p>4.7. User and Access Management</p> <p>What are the approx. number of current users of the existing applications</p>	<p>The BRS provides a baseline estimate aligned to the current active user base, which is approximately 40 users.</p> <p>However, the platform must support scalability beyond this baseline, and the number of users over the contract period will be determined based on SARS operational requirements.</p> <p>(Refer to Section 4.10: Training, Adoption and Support and Section 5.3: Scalability and Performance)</p>



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18.	<p>4.7. User and Access Management</p> <p>Though the new customer insights platform will have its own authentication and RBAC mechanism. For SAARS employees, which UAM/authentication platform is used currently, as the new platform will need to integrate with it.</p>	<p>The BRS specifies that the platform must support role-based access control and integrate with SARS systems as required.</p> <p>Specific internal authentication platforms are not detailed in this tender. Bidders are required to propose solutions that meet the integration and security requirements outlined in the BRS.</p> <p>(Refer to Section 4.7: User and Access Management, Section 4.8: Integration and Interoperability, and Section 13: Security Requirements)</p>
19.	<p>Does SARS intend to operate the platform itself (designing, fielding and analysing its own studies in-house) or does it expect the service provider to design, conduct and analyse customer experience and research studies on SARS's behalf during the contract term? In short, is this a self-service platform or a managed research / CX service?</p>	<p>The BRS outlines that the platform must be provided as a solution that enables SARS to design, deploy, analyse, and act on feedback across the full lifecycle.</p> <p>The BRS also requires the provision of training, support, and strategic advisory services. Bidders are required to propose a solution aligned to these requirements.</p> <p>(Refer to Section 3.1: Scope, Section 4: Functional Requirements, and Section 4.10: Training, Adoption and Support)</p>
20.	<p>4.8. If CX / UX or research professional services are in scope (for example instrument design, fieldwork, qualitative or statistical analysis, insight reports, journey mapping, or work beyond standard surveys such as moderated qualitative research), what volume and cadence should bidders plan for (number of studies, waves or ad hoc requests per annum), and how should these be priced, given the Table 5 technical team specifies only an Account Manager, Project Manager and Technical Resource, and the Pricing Template contains no professional-services line?</p>	<p>Research and CX professional services are not in scope for the tender. The BRS outlines that the platform must be provided as a solution that enables SARS to design, deploy, analyse, and act on feedback across the full feedback lifecycle.</p> <p>The BRS also requires the provision of training, support, and strategic advisory services. Bidders are required to propose a solution aligned to these requirements.</p> <p>(Refer to Section 3.1: Scope, Section 4: Functional Requirements, and Section 4.10: Training, Adoption and Support)</p>
21.	<p>4.9. BRS 4.10 references "strategic advisory to align insights with SARS priorities." Please define the expected form and frequency (for example an embedded analyst, quarterly insight reviews, or on-demand advisory) and confirm whether this is bundled within the fixed annual fee or scoped separately.</p>	<p>The BRS requires that bidders provide access to platform optimisation services and strategic advisory aligned to SARS priorities, and such a request may be On-demand. The form and frequency of such services are not prescribed. This is bundled within the fixed costs. Bidders are required to propose their approach in line with this requirement.</p> <p>(Refer to Section 4.10: Training, Adoption and Support)</p>



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22.	4.10. Beyond go-live on 11 October 2026, what is the service provider’s expected role for the remainder of the three-year term? Specifically, is it limited to platform hosting, support, optimisation and enhancement, or does SARS also expect ongoing involvement in research, CX / UX design, analysis or insight generation across the operational period?	<p>The BRS outlines that the service provider will be responsible for platform hosting, support, optimisation, and ongoing service delivery over the contract period.</p> <p>Research and CX professional services are not in scope for the tender. Bidders should propose their solution in line with the full lifecycle requirements defined in the BRS.</p> <p>(Refer to Section 4.10: Training, Adoption and Support and Section 16: Vendor Requirements)</p>
23.	If the solution requires any configuration, design or build work to meet SARS’s requirements, where does the associated discovery work fit; for example user research, CX / UX design and requirements analysis to inform the platform configuration or build? The six project-plan phases (Mobilisation through Go-live) and the Pricing Template (a single integration and testing line) do not appear to provide for a dedicated design or discovery phase; please clarify whether such work is expected, and how and where it should be planned and priced.	<p>The BRS specifies the required implementation and testing phases and the expected outputs. Including, Data Migration Testing, Integration Testing, Accuracy and Reliability testing.</p> <p>Bidders are required to propose an implementation approach that meets these requirements.</p> <p>(Refer to Section 3.1 Project Implementation Plan in Technical Criteria and Section 4: Functional Requirements, refer to section 15: Testing and Validation)</p>
24.	Which platform is currently in use (product and version), and is it a commercially licensed tool or an internally built solution? This determines what export and import capabilities are available and the realistic migration effort.	Refer to question 1
25.	Can SARS provide a sample of anonymised or masked data and configuration exports under NDA during the bid period; for example CSV extracts, field names, metadata, sample response structures and dashboard configuration exports—together with a detailed migration inventory (number of surveys and projects, responses, contact records, dashboards, calculated fields, attachments and videos, audit logs and user accounts)? The estimated ±4 million responses are stated as “subject to validation,” which cannot be validated without access.	<p>The BRS provides the baseline scope of migration, including the estimated volume of approximately ±4 million historical survey responses.</p> <p>This includes the migration of:</p> <ul style="list-style-type: none"> <li>• Survey responses (structured and unstructured data)</li> <li>• Metadata (survey attributes, respondent details, and distribution data)</li> <li>• Dashboard configurations and reporting structures</li> <li>• Historical insights and datasets across the platform</li> </ul>



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		<p>These assets are outlined to inform bidders of the scale, complexity, and data types involved in the migration.</p> <p>SARS has not provided sample datasets or configuration exports as part of this tender.</p> <p>(Refer to Section 4.9: Data Migration and Section 6: Asset Inventory)</p>
26.	<p>What condition is the historical data in, and who is responsible for data cleansing, deduplication and correction prior to and during migration?</p>	<p>The BRS outlines the requirement for migration of historical data and preservation of datasets.</p> <p>Bidders are required to propose an approach to meet these requirements.</p> <p>(Refer to Section 4.9: Data Migration)</p>
27.	<p>Which existing dashboards and reports must be reproduced like-for-like, and which may be redesigned? BRS 4.9 (“replicate or import key elements”) spans a wide range of effort. How many dashboards and reports are currently active, and can their configurations be exported in a usable format?</p>	<p>The BRS states that key elements of existing dashboard structures must be replicated or imported where required. For example, channel usage, service experience, filing experience.</p> <p>The extent of replication is not further prescribed.</p> <p>(Refer to Section 4.9: Data Migration)</p>
28.	<p>Will there be a data-freeze period before cutover, and will SARS allow the current and new platforms to run in parallel for a period to reduce risk? Will a final delta-migration and reconciliation window be permitted before the 11 October 2026 go-live?</p>	<p>SARS requires bidders to provide a detailed implementation and migration plan that demonstrates how all required phases, including data migration, integration, testing, and go-live, will be successfully executed within the defined timelines.</p> <p>SARS’s approach is to ensure that sufficient planning, testing, and validation is undertaken as part of the implementation phases to support a successful migration and system integration for the new solution.</p> <p>(Refer to Section 4.9: Data Migration and Section 15: Testing and Validation)</p>



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29.	What retention periods apply to historical taxpayer, employee and psychometric data held on the platform?	<p>The BRS specifies that SARS retains full ownership of <b>all</b> data and outlines requirements for data handling and disposal. Specific retention periods are not prescribed.</p> <p>(Refer to Section 12: Compliance Requirements and Section 5.7: Data Portability and Exit Strategy)</p>
30.	What are the specific technologies and versions behind the SARS Enterprise Data Warehouse, CRM, contact centre / IVR and identity and access management environments, and what connection methods, API standards and security protocols are supported? Is Single Sign-On required and, if so, on which standards (for example SAML 2.0, OAuth 2.0 or OpenID Connect) and which IAM (for example Azure AD / Entra or LDAP)?	<p>The BRS requires the platform to integrate with SARS systems, including the enterprise data warehouse, digital channels, and identity and access management environments.</p> <p>It further requires support for API-based integration, including standard approaches for data exchange and embedding, and the capability to support multiple concurrent integrations of varying scale and complexity.</p> <p>The platform must support both real-time and batch data exchange, and should be able to demonstrate a wide range of integration capabilities.</p> <p>Specific technologies, versions, and configurations are not provided.</p> <p>(Refer to Section 4.8: Integration and Interoperability and Section 11: Integration with Existing Systems)</p>
31.	BRS 4.8 refers to interoperability with a “Microsoft AI assistant.” What product is this (for example Copilot), and what integration is expected: a dashboard connection, a data feed to the assistant, or natural-language querying of the platform data?	<p>The BRS refers to interoperability with external tools, such as Microsoft AI assistant, as part of a broader integration requirement.</p> <p>Bidders should demonstrate their solution’s integration capabilities. Specific product configurations or integration approaches are not prescribed.</p> <p>(Refer to Section 4.8: Integration and Interoperability)</p>
32.	Which integrations must be live at first go-live and which later in the term, and are the SARS-side APIs already built and documented, or will they require development on SARS’s side that affects the implementation timeline?	<p>The BRS defines integration requirements as part of the overall platform capability, which includes migration of historic data to the new platform and integration with service channels. However, bidders are required to propose an implementation approach that ensures all required integrations are delivered in line with the go-live requirement and overall platform functionality.</p>



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		(Refer to Section 4.8 and Section 11)
33.	For service recovery (BRS 4.6, 10 and 11): does the platform own the case / remediation workflow (statuses, escalation rules and closure steps), or does it notify an existing SARS CRM, contact-centre or ticketing system (for example via webhook)? Which system is the system of record for service-recovery cases?	<p>The BRS requires the platform to support service recovery workflows, including triggering of actions based on feedback, tracking of issues, and integration with relevant systems (determined internally).</p> <p>The platform must support linking feedback to service touchpoints and enable follow-up actions to different business areas.</p> <p>(Refer to Section 4.6: Service Recovery and Feedback Loops and Section 10: Remediation Workflow)</p>
34.	The BRS uses the terms “real-time,” “immediate” and “near real-time.” What actual latency targets does SARS expect for survey distribution, data capture and dashboard refresh?	<p>The BRS specifies that the platform must support real-time and near real-time data collection (capable of handling large volumes of simultaneous survey distributions without email throttling or significant delays, ensuring efficient delivery during peak campaign periods. ), processing, and reporting.</p> <p>This includes immediate survey distribution following defined triggers and near real-time reflection of responses in dashboards.</p> <p>Specific latency thresholds are not defined.</p> <p>(Refer to Section 4.5: Reporting and Dashboards and Section 8.5: Real-time distribution and collection)</p>
35.	For embedded surveys and dashboards (BRS 4.8 and 11): are there technical constraints on eFiling, the MobiApp, the SARS website, WhatsApp or USSD, such as browser, security or mobile-app limits, that we should know about before proposing iframe embedding?	<p>The BRS requires the platform to support integration and embedding across SARS digital channels, including the ability to embed surveys and dashboards into digital interfaces. The platform must demonstrate the capability to support multiple concurrent integrations of varying scale and complexity, without reliance on a fixed or predefined number of integration points.</p> <p>Specific technical constraints of each platform vary and are not provided in the BRS.</p>



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		(Refer to Section 4.8: Integration and Interoperability and Section 11)
36.	3.7. What development, test and pre-production environments, test data and SARS technical resources will be made available for the build and integration testing?	SARS recognises that customer insight platforms are cloud-based solutions, consistent with the current system architecture. Additionally, SARS manages both quality assurance (QA) and pre-production environments to facilitate platform integration testing. These platforms are incorporated and assessed as part of the standard systems development lifecycle, which includes evaluation within the proposed environment for the platform. For ad hoc projects or campaigns, all testing is conducted within the designated customer insight platform environment; such ad hoc solutions progress through a single environment.
37.	3.8. Are there POPIA-driven requirements on where data masking, hashing and cleaning must occur: inside the SARS environment before ingestion, or within the bidder's approved cloud environment?	The BRS requires full compliance with POPIA and SARS data protection policies, including encryption, secure processing, and controlled access to data. Data masking and data cleaning occurs in the SARS environment.  (Refer to Section 5.4: Security and Data Protection and Section 12: Compliance Requirements)
38.	4.1. For USSD and WhatsApp: must respondents be able to complete surveys directly within these channels, or will these channels be used only to deliver survey links? Which existing SARS WhatsApp Business accounts, USSD short codes or sender IDs must the platform connect to or reuse?	The BRS requires the platform to support distribution across multiple channels, including USSD and WhatsApp. These channels will be used to deliver survey links
39.	4.2. What respondent population will surveys be collected from, and does it include both South African residents and non-residents (for example foreign traders or international taxpayers)? This affects the identity-verification questions and input formats the platform must support; for example South African ID number versus passport number, local versus international contact-number and address formats, and tax-reference formats.	The BRS defines the primary respondent groups as taxpayers, traders, and SARS employees, across multiple interaction points and service channels.  It requires the platform to support data collection across the taxpayer journey and internal employee engagement use cases.  Specific demographic fields and validation rules are not defined as these are managed by SARS.  (Refer to Section 3.1: Scope and Section 6: Asset Inventory)



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	Please confirm the respondent segments and any mandatory verification or demographic fields SARS requires at the point of collection.	
40.	4.3. Does SARS maintain an existing opt-out list or registry that the platform must synchronise with, and should this synchronisation be real-time or via periodic updates provided by SARS?	<p>The BRS requires the platform to support compliance with opt-in and opt-out requirements, ensuring that communications are not sent where consent has not been provided.</p> <p>Synchronisation mechanisms are not prescribed.</p> <p>(Refer to Section 12: Compliance Requirements)</p>
41.	5.1. Which languages must be supported across surveys, text and sentiment analysis, summarisation and transcription, for example Afrikaans, isiZulu and other official languages?	The BRS requires the platform to support data collection and analysis across SARS operations but does not prescribe specific language requirements.
42.	5.2. What accuracy thresholds, explainability and human-review evidence will SARS require before accepting AI-generated sentiment, themes, summaries and suggested actions?	<p>The BRS requires AI-enabled capabilities for sentiment analysis, summarisation, and insight generation. As such, SARS should take advantage of insights from Microsoft AI assistant testing, structured test-case validation, human-in-the-loop review, and documented pass/fail scenarios.</p> <p>(Refer to Section 4.4: Data Management and Analysis and Section 9: Reporting and Metrics)</p>
43.	5.3. Please confirm the complete set of statistical methods required at go-live. The BRS names Conjoint, MaxDiff and predictive analysis; please confirm whether weighting and significance testing are also required.	<p>The BRS requires the platform to have advanced statistical and analytical capabilities.</p> <p>The BRS provides examples such as Conjoint and MaxDiff but is not limited to these. Bidders should demonstrate their platforms complete statistical and analytical capabilities.</p> <p>(Refer to Section 9: Reporting and Metrics)</p>
44.	For psychometric assessments: is the provider expected to administer and interpret these (an HPCSA-regulated activity) to supply validated instruments and scoring, or only to host and distribute SARS-supplied	<p>A) Is the provider expected to administer and interpret these (an HPCSA-regulated activity)</p> <ul style="list-style-type: none"> <li>No, this activity will be carried out by SARS Psychometrists/ IOPS.</li> </ul>



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	<p>assessments? What assessments are currently used (for example Hogan, SHL or SARS-specific instruments), and are they completed inside the platform or only stored and reported from another system?</p>	<p>B) to supply validated instruments and scoring, or only to host and distribute SARS-supplied assessments?</p> <ul style="list-style-type: none"> <li>• Only to securely host and distribute the SARS-supplied assessment and to securely store responses from participants.</li> </ul> <p>C) What assessments are currently used (for example Hogan, SHL or SARS-specific instruments)?</p> <ul style="list-style-type: none"> <li>• The ones listed here and other HPCSA accredited instruments but note these are used and administered independently from the proposed tool.</li> </ul> <p>D) Are they completed inside the platform or only stored and reported from another system?</p> <ul style="list-style-type: none"> <li>• Refer to above response.</li> </ul>
45.	<p>5.5. How will psychometric results feed into employment or talent decisions and HR systems, and what consent, confidentiality and restricted-access arrangements apply under the Employment Equity Act?</p>	<p>All consent, confidentiality and restricted-access arrangements are handled internally and are not part of the requirements for this BRS.</p>
46.	<p>6.1. Which cloud providers and regions are approved, and must all taxpayer and employee data be hosted within South Africa? The SARS Data Protection Agreement permits cross-border transfer in line with section 72 of POPIA: please confirm whether any cross-border processing or hosting is acceptable in practice, or whether in-country hosting is mandatory.</p>	<p>The BRS does not prescribe a specific cloud provider or hosting location.</p> <p>However, the platform must fully comply with POPIA, SARS internal data protection policies, and all applicable governance requirements.</p> <p>The solution must also ensure secure handling, storage, and processing of taxpayer and employee data, including compliance with cross-border data transfer requirements where applicable.</p> <p>(Refer to Section 5.4: Security and Data Protection and Section 12: Compliance Requirements)</p>
47.	<p>6.2. Which security certifications are mandatory for the provider and platform, for example ISO 27001, SOC 2, or any specific South African government security standard?</p>	<p>The BRS requires compliance with SARS internal security policies, POPIA, and applicable data protection and governance requirements.</p>



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Question #	QUESTION/S	ANSWER
		<p>It also requires alignment with recognised standards for data handling and disposal, including ISO 27001 where applicable.</p> <p>Specific security certifications required for the provider or platform are not prescribed in the BRS.</p> <p><b>(Refer to Section 5.4: Security and Data Protection, Section 5.7: Data Portability and Exit Strategy, Section 12: Compliance Requirements, and Section 17: Underlying Principles towards RFP)</b></p>
48.	6.3. What recovery time objective (RTO) and recovery point objective (RPO) must the platform meet, beyond the 99.9% uptime requirement, and are there required penetration-testing and vulnerability-reporting cadences?	<p>The BRS requires a minimum uptime of 99.9% and requires the platform to include monitoring, alerting, and security controls. As such, it is expected that the service provider will provide system monitoring, alerts, and maintain system integrity and reliability over time.</p> <p>Specific RTO, RPO, or penetration testing cadences are not explicitly defined.</p> <p><b>(Refer to Section 5.2: Availability and Uptime and Section 14: Monitoring and Alerts)</b></p>
49.	6.4. What level of security vetting and clearance is required for project and support staff, how long does the SARS vetting process typically take (it must be completed before commencement under embargo per BRS 17), is a specific SARS vetting authority or process mandated, and may offshore personnel access the environment?	<p>The winning bidder will be required to undergo security vetting and clearance in line with SARS policies prior to commencing work. This is required for all relevant staff undergo.</p> <p>The service provider must ensure compliance with all applicable governance and security requirements relating to personnel access.</p> <p><b>(Refer to Section 17: Underlying Principles towards RFP)</b></p>
50.	6.5. Please confirm that the provider must guarantee that SARS information will never be retained or used to train any general-purpose or external AI model, and clarify the approval process for any subcontractors or external AI model providers used in the solution.	<p>SARS retains full ownership of all data and that the service provider may not retain or use SARS data for purposes outside of fulfilling contractual obligations. The service provider must ensure secure handling and appropriate disposal of SARS data in line with POPIA and applicable standards.</p> <p><b>(Refer to Section 12: Compliance Requirements and Section 17: Underlying Principles towards RFP)</b></p>



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Question #	QUESTION/S	ANSWER
51.	1. What support hours, severity definitions and response, restoration and resolution targets will form the SLA; what service credits or penalties apply if the 99.9% or other service levels are missed (RFP 7.8); and what scheduled maintenance windows are permitted?	<p>The BRS requires the service provider to provide post-implementation support, a technical helpdesk, and platform optimisation services.</p> <p>It also requires the definition of a Service Level Agreement (SLA) as part of the support offering, including ongoing support and maintenance of the platform.</p> <p>The platform must meet a minimum availability of 99.9% uptime, excluding scheduled maintenance.</p> <p>Specific definitions of support hours, severity levels, response and resolution times, service credits, and penalties are not prescribed in the BRS and will be communicated to the winning bidder.</p>
52.	7.2. For in-person training, will SARS provide the venue, equipment and facilities, or should these costs be included in the bid? The current baseline cohort is approximately 40 users, delivered online and/or in person at SARS's discretion.	All costs associated with the delivery of the solution, including in-person training, must be included in the bidder's proposed price. Bidders should provide proposals for training whether it is in-person training or online.
53.	7.3. What SARS project resources, subject-matter experts and technical teams will be assigned to the implementation, and what governance applies; for example a steering committee and the progress and risk reporting cadence?	SARS will provide appropriate support to the preferred solution during the implementation phase. These will be internally determined based on operational requirements and as required by the SARS research committee.
54.	7.4. Which SARS teams and external parties will the service provider work alongside during implementation and across the term; for example a SARS CX / UX or research team, ICT and integration teams, data and analytics teams, or third-party vendors managing adjacent systems (CRM, contact centre, Enterprise Data Warehouse)? Please clarify roles, responsibilities and decision-making ownership where the provider and SARS teams overlap.	The preferred platform will be utilised by varying business areas across the organisation. This includes research teams, CX teams and SARS leadership. The roles, responsibilities and decision-making ownership will be defined during the onboarding phase of the winning bidder.
55.	7.5. Will SARS provide the taxpayer-journey touchpoint map and its customer-experience metric definitions (CSAT, NES, NPS) so that dashboards and triggers can be configured to SARS's existing taxonomy?	The customer-experience metric definitions (CSAT, NES, NPS), dashboards and triggers to be configured will be shared during the onboarding phase of the winning bidder.



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Question #	QUESTION/S	ANSWER
56.	Is there a budget ceiling or indicative contract value that bidders should price against?	The RFP does not disclose a budget ceiling or indicative contract value for this tender. Bidders are required to submit a comprehensive, all-inclusive pricing proposal covering all components of the solution, including licensing, implementation, integration, support, and ongoing operations as per the Price template issued.
57.	Please confirm that, under the fixed annual non-usage-based pricing model, all future integrations and platform enhancements required across the three years are included at no additional cost. The BRS states that “no additional or separate costs will be accepted post contract award” and references “no fixed or predefined number of integration points”, rather than only those known at go-live.	Confirmed.
58.	What is the expected contract award and commencement date, and therefore how much implementation time is actually available before the 11 October 2026 go-live?	<p>The RFP does not specify a fixed contract award or commencement date. However, proposals are due on 06 July 2026, after which evaluation, due diligence, and contracting processes will follow.</p> <p>The RFP allows up to 21 working days for finalisation and signing of the agreement after award. This means the actual commencement is likely to occur only after completion of these processes.</p> <p>As a result, the effective implementation window available to the successful bidder prior to the 11 October 2026 go-live is expected to be limited. Bidders are therefore required to demonstrate a robust and accelerated implementation approach that accommodates compressed timelines, including configuration, integration, testing, and data migration.</p>
59.	Technical evaluation criteria 4.1 and 4.3 request screenshots, solution overviews, product documentation, brochures and architecture diagrams as evidence. Please confirm whether this evidence is intended to demonstrate an existing, operational and commercially available platform (consistent with Vendor Requirement 16), and that bidders are not expected to design, build or present a bespoke platform as part of the proposal. If a configurable or partly bespoke solution is acceptable, what design artefacts are expected with the bid; for example wireframes or prototypes rather than existing product screenshots?	<p>Confirmed, the evidence is intended to demonstrate existing operational and commercially available platform.</p> <p>(Refer to section 16 and technical criteria 4.1 and 4.3)</p>



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Question #	QUESTION/S	ANSWER
60.	What are the formal acceptance criteria for go-live, and what does “successful migration” mean to SARS (for example reconciliation totals, validation checks and sign-off)? Which dashboards and reports must be operational from day one?	The BRS defines dashboard requirements as part of the overall platform capability, which includes migration of historic data to the new platform and integration with service channels. In addition, bidders are expected to propose an implementation approach that ensures all required integrations are delivered in line with the go-live requirement and overall platform functionality.
61.	Of the total annual distribution, what volume is sent via SMS? (BRS 4.2)	The BRS does not specify the distribution volumes per channel.  Bidders should note that the platform must support high-volume distribution across all channels, including SMS. (Refer to Section 4.2: Survey distribution)
62.	What is the expected mix of surveys by length across three bands: short transactional surveys of 1 to 7 questions, medium surveys of 8 to 30 questions, and large surveys of 31 to 90 questions? (BRS 4.1)	The BRS specifies that surveys typically range between 5 and 30 questions, with the platform capable of supporting surveys of up to approximately 90 questions. The distribution or proportion of surveys across different length categories is not prescribed. (Refer to Section 4.1: Survey Design and Configuration)
63.	For the SMS channel, is the survey conducted as a two-way SMS exchange, where the respondent replies by SMS, or as an SMS linking through to an online survey? What monthly distribution volume and response rate is the current SMS programme seeing, and how many questions are typically asked per SMS survey? (BRS 4.2)	The BRS requires the platform to support SMS as a distribution channel. SMS will be used to delivery survey links.  Bidders should note that the platform must support high-volume distribution across all channels, including SMS.
64.	Does SARS use any third-party business intelligence or visualisation tools to report on survey data and insights internally? If so, which tools? (BRS 4.5, 9)	The BRS requires the platform to provide reporting and dashboarding capabilities, including real-time dashboards, visualisation, and AI-generated insights. It also requires integration capability with other systems. Bidders are required to demonstrate their platforms varying integration capabilities.
65.	For the existing dashboards to be replicated under section 6, how are they currently produced, and can their structure be shared to support accurate replication? (BRS 6, 4.5)	Refer to question 27.



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Question #	QUESTION/S	ANSWER
66.	How will the historical data, approximately 4 million records, be made available to the appointed provider for migration, and in what format? For example, as a structured export such as CSV over SFTP. Please confirm the access method and format. (BRS 4.9)	The BRS outlines the data formats to be migrated, including XLSX, CSV, and other flat file formats.  Access methods and detailed data transfer mechanisms will be provided to the preferred bidder for migration planning.
67.	For the psychometric assessments, is the scope limited to administration and data collection, or does it extend to psychometric analysis and scored interpretation? (BRS 3, 6)	Refer to Question 44.
68.	For the video feedback component, is the scope to analyse the video recordings and produce all insights, or does SARS already have a video-analysis partner whose outputs would be ingested and consolidated with other findings? Please also confirm the source and format of the video data. (BRS 9)	The BRS outlines the requirements of the platform to support AI-driven analysis and summarisation of qualitative, including video feedback where applicable.  The BRS does not prescribe the video format and source. Bidders are required to demonstrate their platforms video feedback summarisation and analysis capabilities.
69.	The specification references WhatsApp as an embedding channel in section 4.8, but does not list it among the distribution channels in section 4.2. Please confirm whether WhatsApp is intended as a survey distribution or response channel, and if so, the expected volume. (BRS 4.8, 4.2)	Refer to Question 38.
70.	For single sign-on, which identity and access management provider and standard does SARS use?	Refer to Question 30.
71.	For message distribution, is the appointed provider expected to integrate with SARS's existing messaging gateways, or is SARS open to the provider using its own gateways where competitive pricing can be demonstrated? (BRS 4.8)	The BRS requires integration with SARS systems and channels, including SARS's existing messaging gateways.
72.	Please confirm SARS's audit trail retention requirements, specifically the depth and retention period of change history required over the contract term. (BRS 5.8, 13)	Refer to question 29.
73.	Please provide the minutes and attendee list from the virtual briefing session. (Process)	Briefing session slide will be posted both on the SARS website and the eTenders Portal.



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Question #	QUESTION/S	ANSWER
74.	<p>BRS 4.9 Data Migration</p> <p>For data migration activity from current system to the customer insight platform, we assume the number of records to be migrated are around 4 million, please confirm.</p>	Refer to Question 25
75.	<p>BRS 4.9 Data Migration, 6 Asset Inventory We are assuming underline data model for new customer insight application will be similar to the current system without any major enhancement. Please confirm (a) the incumbent platform, (b) whether SARS will provide extracts in the listed flat-file formats (XLSX/CSV) or whether the bidder must extract via the legacy platform's API/admin console, (c) whether a data dictionary/schema and a representative sample dataset can be made available to bidders (or at due-diligence stage) to enable accurate migration design, and (d) no. of total tables and approx data attributes with in the each table.</p>	<p>A) Refer to Question 1            B) Refer to Question 67            C) Refer to Question 25            D) Refer to Question 25</p>
76.	<p>BRS 4.9 Data Migration, 6 Asset Inventory Scope of "insights" and "dashboard configurations" in migration. Please clarify whether "insights" means raw and structured response data only, or also derived/aggregated analytics and historical sentiment/scoring outputs and computed metrics; and whether "Dashboard Configurations" requires functional re-creation of equivalent dashboards on the new platform rather than a like-for-like import (dashboard definitions are generally not portable between platforms). Please also confirm the historical retention window (number of years) in scope.</p>	Refer to Question 25
77.	<p>BRS 4.5 Reporting and Dashboards , 9 Reporting and Metrics ,6 Asset Inventory Please confirm whether we would be same reporting tool and migrating to new reporting tool. Please confirm existing reporting tech stack vs new reporting tool in customer insight platform.</p>	Refer to Question 65
78.	<p>BRS 4.5 Reporting and Dashboards , 4.8 Integration with Existing Systems, 11 Reporting and Metrics ,6 Asset Inventory Please confirm whether reporting and dashboards must be delivered</p> <p>(i) natively within the insights platform,</p>	<p>The BRS requires the platform to provide reporting and dashboard capabilities with real-time and AI-driven insights.</p> <p>The BRS does not detail specific reporting technology.</p> <p>(Refer to section 4.5 and 9)</p>



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	(ii) (ii) surfaced within SARS's existing enterprise BI/analytics environment - and if so, please name the mandated standard (e.g. Power BI)	
79.	BRS 4.4 Data Management and Analysis Please clarify whether integrated analytical layer is expected to reside within the insights platform, or be constructed in SARS's EDW/analytics environment with the platform acting as a data source.	The BRS requires the platform to support data analysis, including AI-enabled capabilities within the platform, as well as integration with SARS systems.  (Refer to Section 4.4: Data Management and Analysis)
80.	BRS 4.9 Data Migration, 6 Asset Inventory Please provide an indicative inventory: the approximate number of existing dashboards/reports, the user/role segments they serve, and confirm whether all are required at go-live or phased thereafter.	Refer to Question 10
81.	BRS 4.5 Reporting and Dashboards Please define the acceptable data-to-dashboard latency target (e.g. seconds, minutes, hourly) for (a) survey response capture and (b) operational-data integration from the EDW	Refer to Question 34
82.	BRS 4.4 Data Management and Analysis – AI sentiment/summarisation/predictive, BRS 9 Reporting and Metrics – AI analytics Please confirm (a) whether AI-generated outputs (sentiment scores, themes, summaries) must be persisted back into SARS's EDW for independent downstream reporting and audit, or may remain within the platform; and (b) the languages in scope for open-text analytics and summarisation across South Africa's official languages, given the impact on model selection and analytical accuracy.	A) The BRS does not prescribe requirements for persistence of AI outputs. B) Refer to Question 41
83.	BRS 15 Testing and Validation – Data Migration Testing, 4.9 Data Migration Acceptance criteria, cutover model and PII handling: For "Data migration testing" and "report migration" to confirm data is migrated "completely, accurately, and securely," What is the acceptance criteria and acceptance threshold. Please confirm (a) the completeness/accuracy acceptance criteria and reconciliation approach SARS will apply at sign-off; (b) whether a phased migration or parallel run is acceptable, or a single big-bang cutover is mandated; and (c) POPIA handling expectations for opt-out lists and PII within historical free-text during migration (any masking/anonymisation requirements).	a) Refer to Question 28 b) Refer to Question 28 c) Refer to Question 37



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Question #	QUESTION/S	ANSWER
84.	3.2. Objectives While the solution landing is a responsibility owned by the Service provider, has SARS put together a Roadmap, prioritisation and timeline view based on the priority of the Business requirements for various user group like Individual, Commercial, Agents and internal? if so please out line the framework and decisions they are based on?	The BRS does not prescribe a detailed roadmap or prioritisation framework.
85.	7.3 Technical evaluation process a) Are bidders allowed to have partnership with OEM (and their resellers). b) Is there a criteria on OEM contribution to the engagement, while we remain the primary bidder. c) Is it fine to subcontract some role to third party, while the primary ownership remains with the bidder. d) Can we share/demonstrate the referrals of OEM/third party as part of the reference criteria.	<p><b>a) Partnerships with OEMs</b> Bidders are permitted to enter into partnerships with OEMs and/or their resellers. Such arrangements must be clearly disclosed in the proposal, including the nature of the relationship and the role each party will perform.</p> <p><b>b) OEM contribution where bidder remains primary</b> There is no prescribed minimum contribution for OEMs; however, bidders must clearly outline the roles and responsibilities of all parties involved. The primary bidder remains fully accountable to SARS for the delivery of the solution and overall contract performance.</p> <p><b>c) Subcontracting to third parties</b> Subcontracting is allowed, provided that it is disclosed in the bid submission and clearly defines the scope, percentage allocation, and participating subcontractors. The primary bidder retains full responsibility for performance, and any subcontracting arrangement is subject to SARS approval.</p> <p><b>d) Use of OEM/third-party references</b> Bidders may include OEM or third-party references as part of demonstrating experience, provided that such references are relevant to the proposed solution and supported by appropriate agreements. The bidder remains responsible for demonstrating its own capability and for delivering the contract.</p>
86.	7.3 Technical evaluation process (Gate 1) Please help by detailing out what similar means here "highlight the bidder's relevant experience with the successful completion of similar projects within past 10 years". Can non-Government client/customers be considered and their references be admissible? 4 KEY ACTIVITIES AND DATES Can the submission timelines be extended as strict referral policy takes time to source from the Clients we have serviced in past. Consider moving out the submission date to 13th July or thereafter please and acknowledge.	<p>"Similar projects" refers to projects of a comparable nature, scale, and complexity to the current requirement, particularly involving customer insights, survey platforms, analytics, and system integrations. The focus is on demonstrating successful delivery of end-to-end solutions that align with the functional scope of this RFP over the past 10 years.</p> <p>Non-government clients may be considered. References from both public and private sector clients are acceptable, provided they clearly demonstrate relevant experience, successful delivery, and meet the required reference criteria (e.g. signed letters, scope description, and contactable details).</p>



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		The submission deadline remains as issued 06 July 2026 at 11:00 AM. Any extension to this date is at SARS' discretion and will only be valid if formally communicated through an official addendum.
87.	Non-Functional Requirements Can SARS team advise us on the Disaster recovery requirements they follow and expect us to adhere to.	Refer to Question 48.
88.	Objectives Openness to renegotiate the current product and its license expiry in October as that would not give enough time for the new platform to be setup, integrated with current estate and data migration to effectively conclude. Is SARS open to extend the current targeted timeline as 11 days(considering end of September finalisation) are not practically possible	The implementation timeline, including the requirement for go-live by 11 October 2026, remains a defined milestone of the RFP. Bidders are expected to structure their implementation plans, including integration and data migration, to meet this deadline. While the concern regarding the limited timeframe is acknowledged, the RFP does not provide for an automatic extension of the current platform licence or project timelines. The responsibility lies with bidders to demonstrate how delivery will be achieved within the stated period, including mitigation measures for associated risks. Any request to extend the timeline would be at SARS' discretion and will only be valid if formally communicated through an official addendum.
89.	Which components of the current programme are expected to be retained versus redesigned (e.g. surveys, dashboards, data models, and the Employee Engagement Index framework)?	Refer to Question 27
90.	What internal operational data sources are currently integrated, and which additional sources are planned for future integration?	Refer to Question 30
91.	What unique identifiers will be available to link survey feedback to operational data at an individual level?	The SARS project team will support the preferred service provider on the identifiers to use to link survey feedback to operational data. This will be shared during the onboarding phase for the winning bidder.
92.	Are there any governance or regulatory constraints around linking taxpayer-level data across systems?	Refer to Question 37.  (Refer to Section 12: Compliance requirements of BRS)
93.	Should the solution function as a central data repository, or integrate into an existing enterprise data warehouse?	Refer to Question 30.



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94.	Are there existing data models or standards that the solution must align to?	<p>Bidders are required to propose solutions aligned to SARS integrations and data requirements.</p> <p>(Refer to Section 4.8 of BRS)</p>
95.	What level of self-service capability is expected, and which user groups should be able to design surveys, launch campaigns, and access reporting?	<p>The BRS requires the platform to support survey design, deployment, analysis, and reporting by SARS users.</p> <p>This includes support for role-based access and usage across the organisation.</p> <p>Furthermore, the BRS outlines that the platform must support ease of use for non-technical users while still offering advanced configuration options for power users.</p> <p>(Refer to Section 4 and 5.1)</p>
96.	Can you confirm the scope of historical data migration (approximately 4 million records), including volumes, formats, and preferred transfer methods?	Refer to Question 25
97.	To what extent should existing dashboards and measurement architecture be replicated, redesigned, or optimised as part of the new solution?	Refer to Question 27
98.	What reporting hierarchies and levels of granularity are required (e.g. national to branch level)?	<p>The BRS requires role-based dashboards and reporting capabilities across different business areas.</p> <p>Specific reporting hierarchies are not prescribed.</p> <p>(Refer to Section 4.5)</p>
99.	What were the key challenges with previous solutions that this programme should address?	Refer to Question 16.
100.	What internal capabilities and resources will be available from SARS to support implementation and integration?	<p>SARS will provide appropriate support for implementation.</p> <p>Specific resource allocation will be determined during the onboarding phase and be based on operational requirements.</p>



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101.	3. Can you confirm key milestones and dependencies ahead of the required go-live date, and whether a phased rollout would be acceptable?  14.	The BRS and technical criteria defines the required implementation phases and go-live requirement.  (Refer to Technical Criteria and BRS Section 15)
102.	What are the expectations for platforms that will require integration, specifically in relation to native “in-app” surveying?	The BRS requires embedding and integration of surveys within SARS digital channels.  (Refer to Section 4.8)
103.	15. The RFP highlights challenges with the manual processing of qualitative data. Could you clarify the expected approach to qualitative research, including the types of data, analysis requirements, and desired outputs?	The BRS requires support for qualitative data analysis, including AI-enabled sentiment analysis, summarisation, and insight generation.  (Refer to Section 4.4 and Section 9)