



RFP 07/2026

THE PROCUREMENT OF A MASTER DATA MANAGEMENT AND DATA GOVERNANCE SOLUTION

Non-Compulsory Briefing Session

Date: 04 May 2026

Closing Date: 21 May 2026

 SARS

South African Revenue Service

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Welcome and Introduction

Governance, Rules And Procedures

Non- Compulsory Briefing Session

Purpose

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

It may contain

- additional information
- additional rules that must be adhered to

It does not

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

The briefing session slides will be uploaded to SARS & NT Portals.

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

Procedures during Briefing Session



Questions during the session.

SARS will take written questions submitted during the session

SARS will review and focus on most pertinent themes arising from the questions and provide answers where possible

All questions and answers will be posted to the SARS Website and e-Tender portal as part of the wider Q & A process

The SARS Website and e-Tender portal answers will take precedence over any verbal response given in the briefing session



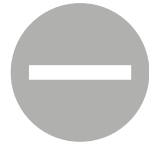
The session is being recorded

Governance Requirements



Strict communication channels

Bidders will be disqualified for non-compliance



No solicitation of information will be allowed other than by prescribed channels



Deadlines to be strictly met



Adhere to prescribed submission format to ensure queries are properly dealt with

RFP Timelines

RFP TIMELINES

ACTIVITY	DATE DUE
Advertisement of Bid in the SARS Website and e-Tender	21 April 2026
Non-Compulsory briefing session	04 May 2026 at 10h30
Last day for Bidders to submit written questions	13 May 2026
Last day for SARS response to Bidder's written questions	15 May 2026
Bid Closing Date	21 May 2026 at 11h00
Notice to bidders	Before the end of 2026

Background and Requirements

BACKGROUND & REQUIREMENTS

SARS is inviting qualified service providers to deliver an end-to-end master data and data governance solution that adheres to global best practices. The solution must enforce clear data ownership and stewardship, provide mechanisms for automated and integrated metadata management, ensure data lineage and traceability, and support comprehensive data quality controls. Additionally, it should offer robust security and privacy features to safeguard sensitive data, facilitate regulatory compliance, and enable proactive monitoring and auditing.

BRS



Adobe Acrobat
Document

BACKGROUND & REQUIREMENTS

Technical Requirements

- Master Data Management.
- Data Cataloguing and Metadata Management
- Visual Data Lineage and Impact Analysis
- Unified Access
- Scalability
- User-Friendly Interface
- Data Quality Management
- Management of Data Privacy and Security
- Policy and Compliance Management
- Workflow and Collaboration
- Reporting and Monitoring Capabilities
- Version Control and Change Management
- Data Governance Integration Capabilities
- Real-Time Data Governance

Non-Technical requirements

- Implementation Plan
- Post-Implementation Support
- Training and Knowledge Transfer
- Licensing Packages

Technical Requirements

1. Master Data Management

- The solution must support the creation, maintenance, and management of master data entities without requiring the migration of data to a new environment.
- The solution must have capabilities such as Data Virtualization that integrates all enterprise data siloed across the diverse systems and delivers it to business users in real time, without physically storing the data.
- The solution must provide workflow automation to facilitate master data approval, stewardship, and governance processes, ensuring all updates are subject to appropriate oversight.
- Data validation and enrichment processes must be included to identify and resolve data quality issues at the point of entry.
- Role-based access controls and Attribute-Based Access Controls must be implemented to restrict modifications and access to master data to authorized users only.
- The solution must offer dashboards and reporting tools for real-time monitoring of data quality metrics, compliance status, and governance activities.
- The solution must facilitate collaborative model development, allowing multiple stakeholders to propose, review, and approve modifications in a controlled, versioned environment that aligns with organizational governance policies.

Technical Requirements

2. Data Cataloguing and Metadata Management

The solution must be equipped with robust functionality to catalogue metadata through automated discovery methods. The solution must provide the following key data cataloguing and metadata management components:

- Integrated, centralized storage of metadata
- Automated metadata discovery
- Data classification and audit trail capabilities.

3. Visual Data Lineage and Impact Analysis

The solution must incorporate and facilitate both visual data lineage and robust impact analysis capabilities to ensure comprehensive oversight and management of data throughout its lifecycle.

4. Unified Access

The solution must allow users to access a single source of truth. This reduces redundancy and ensures consistency across different data systems.

Technical Requirements

5. Scalability

- The solution must be able to scale with SARS's data needs, accommodating growing volumes of data and metadata without compromising performance.
- It should support multi-domain master data management, allowing flexible modeling and management of diverse data domains.
- The solution must enable real-time or near-real-time synchronization of master data across distributed systems to minimize latency and support operational efficiency.

6. User-Friendly Interface

- The solution must have an intuitive interface that enables data stewards, analysts, and other stakeholders to navigate the system efficiently without encountering unnecessary difficulties.
- It should also provide self-service governance capabilities to allow business users, even those without extensive technical knowledge, to independently implement governance policies.
- The solution is required to be provided in English.

Technical Requirements

7. Data Quality Management

- To ensure the reliability and usability of organizational data, the solution must incorporate comprehensive data quality management features.
- The solution must provide mechanisms for defining, tracking, and reporting on key quality metrics including completeness, validity, accuracy, timeliness, uniqueness, reliability, relevancy, consistency and integrity. using automated profiling tools and analytics. Data quality scoring dashboards covering the quality principles should give stakeholders a clear view of current quality levels and highlight areas that require attention and outlines recommendations.

8. Management of Data Privacy and Security

- Compliance and security features, which are critical for ensuring the integrity, confidentiality, and availability of data.
- Apply Data masking techniques to protect sensitive data from unauthorized access.
- Implement end-to-end encryption.
- Adhere to data protection regulations such as POPIA by ensuring that sensitive data is adequately protected

Technical Requirements

9. Policy and Compliance Management

- The solution must facilitate the seamless integration of regulatory controls and policies.
- Support automated workflows for policy enforcement. Automation is essential in streamlining processes, minimizing human error, and enhancing efficiency.
- Ability to produce comprehensive compliance reports. These reports should provide clear and actionable insights into the organization's compliance status, highlighting areas of strength as well as those requiring attention.
- The reporting functionality should be flexible, allowing for customization based on different regulatory requirements or internal needs. This capability is crucial for internal audits, external assessments, and for maintaining open communication with stakeholders regarding compliance efforts.

10. Workflow and Collaboration

The solution must be capable of creating workflows for data owners, data stewards, and data governance team; enabling SARS to efficiently manage and oversee its data assets throughout their lifecycle. This includes the ability to define, implement, and monitor processes that ensure data quality, compliance, and security.

Technical Requirements

11. Reporting and Monitoring Capabilities

- The solution must provide advanced reporting and monitoring functionalities tailored for master data and data governance requirements. It should enable real-time dashboards and scheduled reports that track data quality metrics, such as completeness, accuracy, consistency, and timeliness of master data across the organization.
- These dashboards should be configurable, allowing data owners, stewards, and governance teams to drill down into specific domains, datasets, or processes to identify anomalies, trends, or compliance gaps.
- The dashboards must provide visual representations of key metrics, such as data quality scores, metadata movement stats, compliance status, and workflow progress, allowing data owners and stewards to make informed decisions quickly.
- Comprehensive monitoring tools must allow for the automatic detection and alerting of policy violations, unauthorized data access, and data quality issues.
- The solution should support the generation of historical reports that show changes to data definitions, lineage, and stewardship activities, providing a clear audit trail for internal oversight and external regulatory review.

Technical Requirements

12. Version Control and Change Management

- Incorporate a robust Version Control and Change Management features to ensure effective Change Tracking throughout the data lifecycle. This entails the systematic maintenance of comprehensive logs that document all modifications made to data models, policies, or metadata.
- Such logs are essential for transparency and accountability, allowing stakeholders to trace the history of changes and understand the rationale behind each modification.
- It must provide the capability to revert changes when necessary, enabling users to restore previous versions of data models or policies in the event of errors or unintended consequences.

13. Data Governance Integration Capabilities

- Facilitate seamless integration with all existing information systems and workflows across various processes,
- The solution must offer robust capabilities for monitoring and auditing data flows across systems, ensuring compliance with regulatory requirements and internal policies.
- The solution must enable integration for a hybrid (Cloud and On-Premises) environment, ensuring a seamless and cohesive approach to data management.

Technical Requirements

14. Real-Time Data Governance

- The solution must be designed to provide real-time notifications that alert users to any violations of established data policies or concerns related to data quality.
- The solution should incorporate automated remediation features. These features would allow the system to automatically resolve data issues or enforce governance policies without requiring human intervention.

Non-Technical Requirements

1. Implementation Plan

- Proposed project methodology (e.g., Agile, Waterfall, hybrid).
- Comprehensive communication plan.
- Proposed timeline for deployment in a form a project plan which includes required milestones.
- Integration approach with existing systems.
- Testing and quality assurance plan.
- Resource allocation, roles and responsibilities.
- Risk management strategies.

2. Post-Implementation Support

- Description of support services.
- Solution Support and Maintenance
- Regular software updates and patches to address bugs and security vulnerabilities.
- Dedicated account manager and support team.
- Knowledge base and self-service portal for common issues. Post implementation support must include professional services.

Non-Technical Requirements

3. Training and Knowledge Transfer

- The Supplier must be available for and to provide training on how to operate the solution for
 - Super User
 - End-user training
 - An internal hybrid "train the trainer" approach will be implemented, utilizing both in-person and virtual sessions.
 - Tailored Training Programmes: role-based training sessions, ensuring that different user groups receive relevant, practical instruction that matches their day-to-day responsibilities. Training
- The Supplier must provide training on new features or updates to the solution.
- The Supplier must conduct knowledge transfer and provide sustainability plan for SARS.
- The Supplier must implement comprehensive strategies that facilitate smooth transition, acceptance, and effective use of the new system across SARS.

Non-Technical Requirements

4. Licensing, Subscription and once off costs (Packages)

- The supplier must ensure that their pricing structure is inclusive of the following items and supported by a cost breakdown.
- SARS requires an enterprise license in accordance with the Supplier's licensing model in alignment with the SARS technology onboarding licenses.
 - Detailed pricing structure, including licensing fees, implementation costs, training, and ongoing support/maintenance.

Bid Evaluation Process

BID EVALUATION PROCESS

Gate 0

Prequalification's Evaluations

Bidders are required to refer to Section 7.2 of the Main RFP document for the mandatory requirements applicable.

**Invitation to Bid –
SBD 1**

**Declaration of
Interest (SBD 4)**

**Supplier Risk
Questionnaire**

**Preference Point
Claim Form – SBD
6.1**

**Central Supplier
Database Report**

**General conditions
of contract (GCC)**

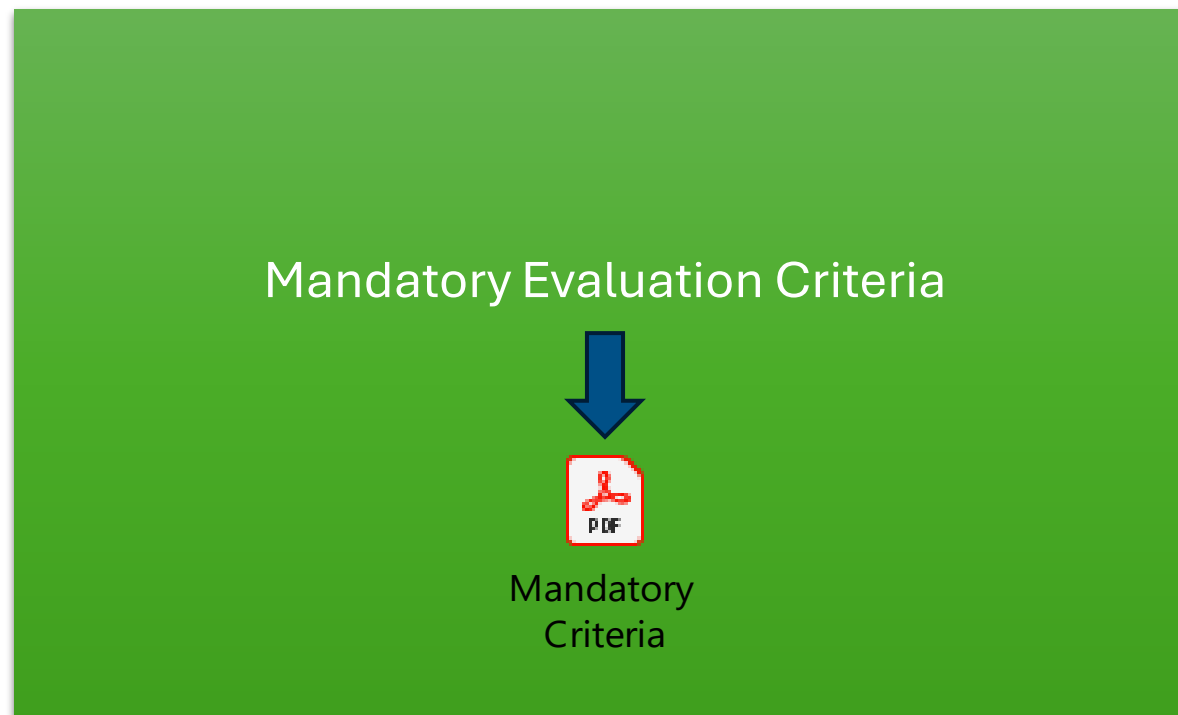
**Annual Financial
Statements**

BID EVALUATION PROCESS

Gate 1

Mandatory Evaluations

Bidders are required to refer to Section 7.3 of the Main RFP document for the mandatory requirements applicable.

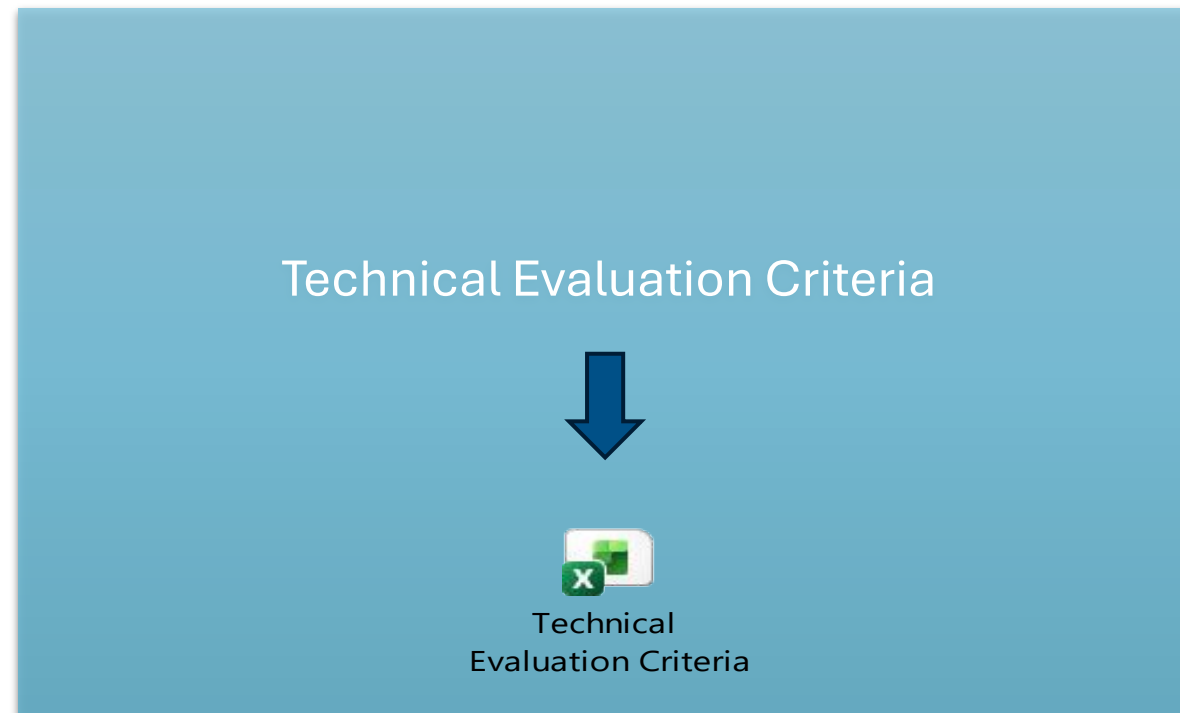


BID EVALUATION PROCESS – GATE 2 TECHNICAL EVALUATION

Total Points – 100

Threshold - 66.67 Points

Bidders are required to refer to Section 7.4 of the Main RFP document for the Technical requirements applicable.



Price & Specific goals

BID EVALUATION PROCESS – GATE 3

Refer to section 7.5 (Page 25) of the RFP Main doc

PRICE = 80

+

SPECIFIC
GOALS = 20

=

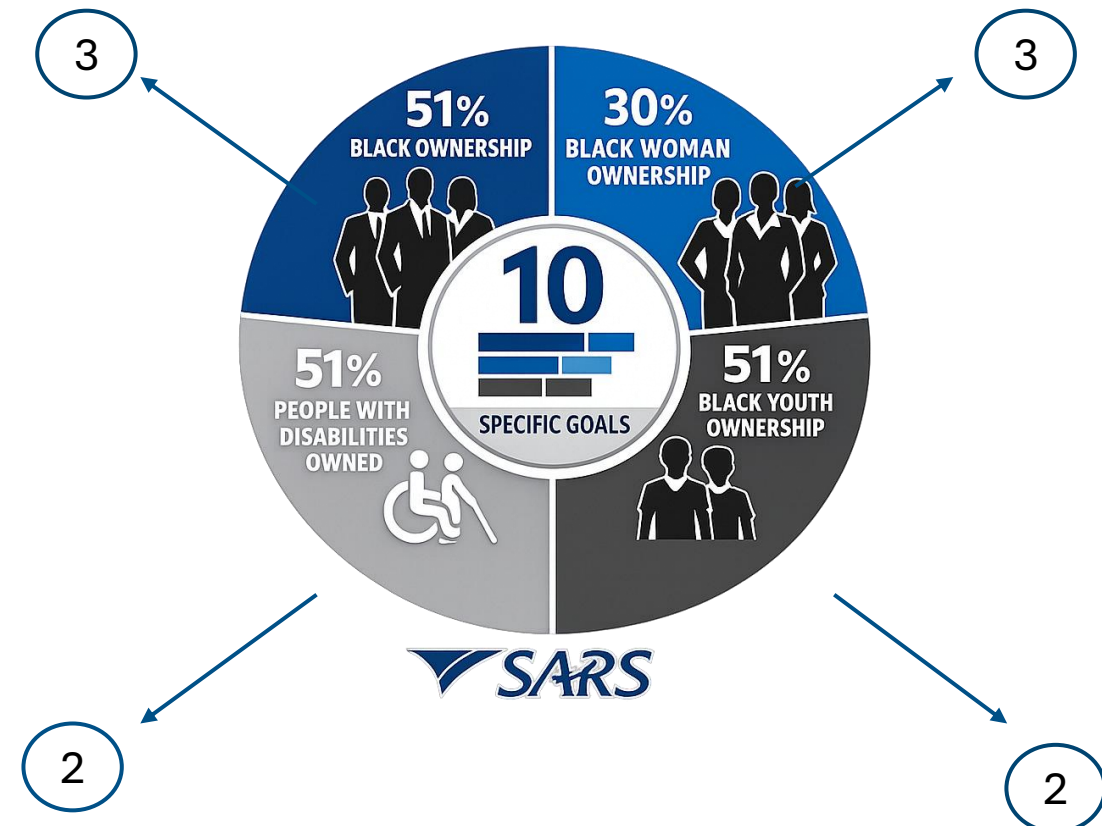
TOTAL 100

BID EVALUATION PROCESS – GATE 3 Specific Goals

Specific goals = 20 Points

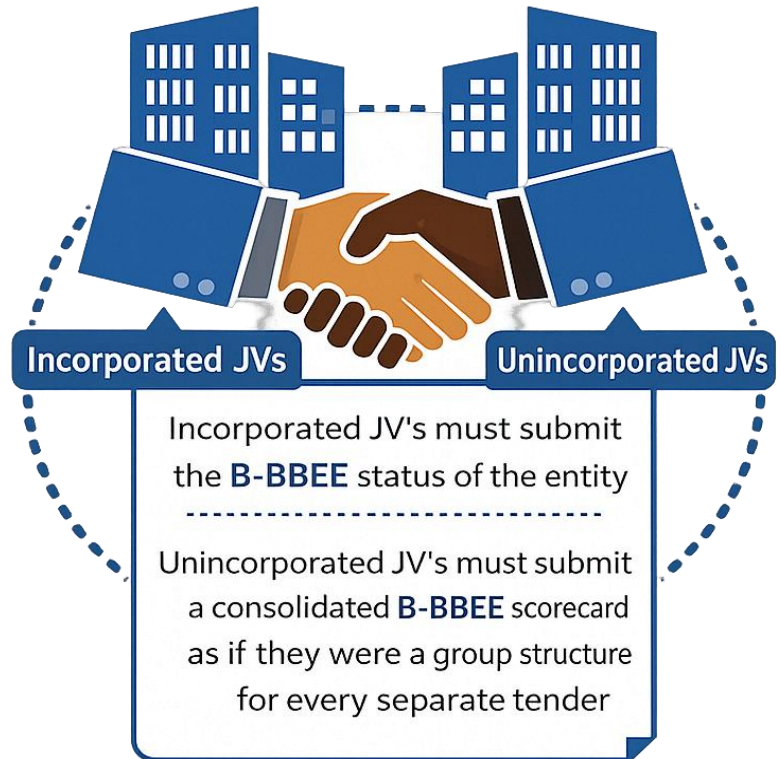
Specific goals points may be allocated to Bidders on submission of documentation or evidence as follows:

- Bidders **MUST** complete and sign the SBD 6.1 form to claim the points for Specific goals, failing which, the Bidder will be scored zero.
- Maximum points to be awarded = 20
- Points system to be used for this tender 80/20
- **TO BE UPDATED BY BBBEE**



B-BBEE Certificate/Affidavit

Below indicates the specific B-BBEE certification documents that must be submitted for this tender.



Use and acceptance of Affidavits

Section 1.6 of SBD 6.1 states...

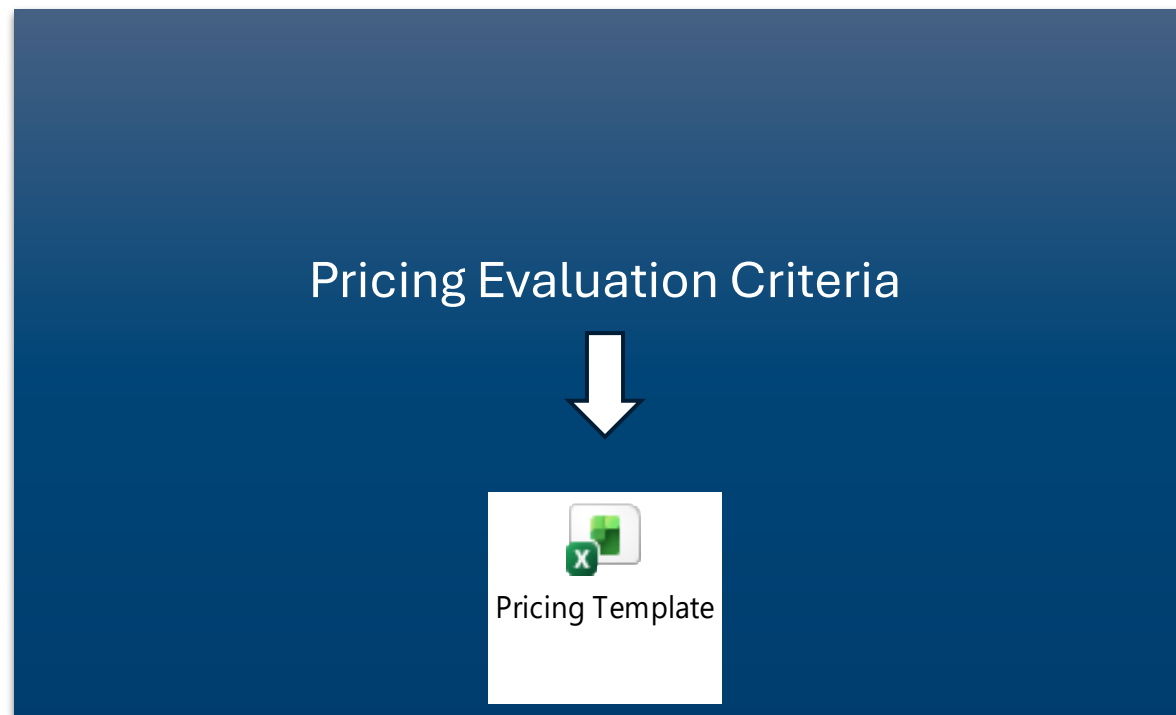
- *“The organ of state reserves the right to require of a tenderer, either before a tender is adjudicated or at any time subsequently, to substantiate any claim regarding preferences, in any manner required by the organ of state”.*
- SARS reserves the right to request that bidders submit proof of their Black ownership and turnover information in support of their Affidavits.

BID EVALUATION PROCESS

Gate 3

Pricing Evaluation

Bidders are required to refer to attachment SARS RFP 07-2026 5-1 Master Data and Data Governance Solution Price Template of the tender pack.



07

Financial Analysis

Financial Analysis Evaluation

Bidders are required to submit the public interest score and complete sets of audited / independently reviewed annual financial statements in compliance with the Companies Act for the three (3) most recent financial periods in the name of the bidding entity. The financial statement analysis will be conducted on the shortlisted bidders.

The annual financial statements must contain:

- Statement of Profit and Loss and Other Comprehensive Income;
- Statement of Financial Position;
- Statement of Cash Flows;
- Statement of changes in equity/ net assets ; and
- Accompanying Notes.

Entities which are trading for less than three (3) financial periods must provide:

- A letter detailing that fact, signed by a duly authorized representative of the entity;
- The annual financial statements that the entity can provide, considering the period that it has been trading; and
- Any other information or documentation which would provide more clarity on the financial history of the bidder.

Financial Analysis Evaluation

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

- Annual financial statements of the JV for a registered JV and for unincorporated JV annual financial statements of each company;
- A JV legal agreement detailing the percentage ownership of each entity; and
- A consolidated B-BBEE Certificate.

NB: SARS reserves the right to request further information with regards to the annual financial statements of a bidder at a later stage.

Services Agreements

Service Agreements

SARS has issued the tender together with the General Conditions of Contract (GCC). These terms are non-negotiable and must remain unaltered.

- All bidders are required to acknowledge their acceptance of these terms by signing on the final page of the GCC.
- SARS will enter into a separate agreement with the successful bidder; that agreement may be subject to negotiations , provided that any changes comply with applicable legislation and SARS policies.

RFP Pack Contents

RFP Pack Contents

The Tender Pack

Section	Document name
1	SARS RFP 07-2026 1-0 SARS Bid Invitation Letter
	SARS RFP 07-2026 1-1 SARS Main RFP document
2	SARS RFP 07-2026 2-1 Business Requirement Specification
3	SARS RFP 07-2026 3-1 Invitation to bid (SBD 1)
	SARS RFP 07-2026 3-2 Declaration of Interest Form (SBD 4)
	SARS RFP 07-2026 3-3 Preference points claim form (SBD 6.1) PPR 2022
	SARS RFP 07-2026 3-4 Supplier Risk Questionnaire
	SARS RFP 07-2026 3-5 SARS General Conditions of Contract (GCC)

RFP Pack Contents

Section	Document name
4	SARS RFP 07-2026 4-1 Technical Evaluation Criteria
	SARS RFP 07-2026 4-2 Mandatory Requirements
	SARS RFP 07-2026 4-2-1 Mandatory Response Template
	SARS RFP 07-2026 4-3 Client reference template
5	SARS RFP 07-2026 5-1 Master Data and Data Governance Solution Price Template
	SARS RFP 07-2026 Oath of Secrecy

RFP submission and contact details

RFP submission and contact details

The bidders must submit a single hardcopy of its proposal contained in several hardcopy files, and a single electronic copy written to several Universal Serial Bus (USB) by **21 May 2026 at 11:00**



1 X Hardcopy submission
clearly marked



1X Electronic Submission

- The hardcopy and electronic submission must be marked and labelled correctly, and must be outer sealed, wrapped and packaged for ease of reference during the evaluation process.

TENDER BOX

The tender must be submitted to



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

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

RFP submission and contact details

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

Email format:

Subject : “RFP 07-2026 – Question”
Body : “Question – <Question text>”

RFP Submission Files format

All RFP Submission files **MUST** be in the following format:

- Table of Contents aligned with Tender documentation
- Numbering as per Tender documentation and provided Templates
- RFP Submission Files to be **clearly labelled** as per Table of Contents and Templates

Instructions for submitting a response to this RFP – File Non-Pricing (NP)

Files		Section	Responses
Folder 1: TECHNICAL proposal	RFP reference Description Bidder name	1	<ul style="list-style-type: none"> Prequalification documents (SBD and other documents), excluding SBD 6.1 Preference point claim form and SBD 3.1 / 3.2 / 3.3.
		2	<ul style="list-style-type: none"> Response to mandatory requirements (if applicable) Supporting documents for mandatory requirements (if applicable)
		3	<ul style="list-style-type: none"> Response to technical requirements Supporting documents for technical requirements
		4	<ul style="list-style-type: none"> Company profile Supplementary information
		5	<ul style="list-style-type: none"> General Conditions of Contract

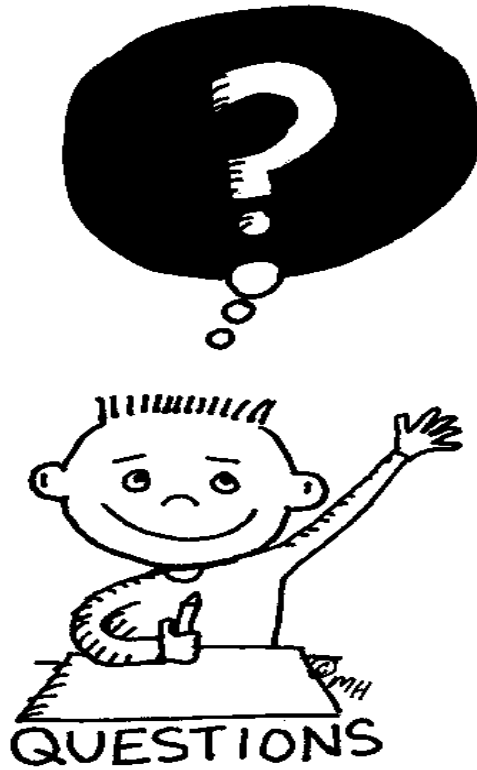
Instructions for submitting a response to this RFP

- Pricing and Specific goals Section

Files		Section	Responses
Folder 2: PRICE and B-BBEE/ specific goals proposal	RFP reference	1	<ul style="list-style-type: none"> ▪ B-BBEE certificate or sworn affidavit or ▪ SBD 6.1 Preference point claim form ▪ CIPC registration documents or ▪ Letter from an attorney or registered accountant in their letterhead
	Description	2	<ul style="list-style-type: none"> ▪ Pricing response template
	Bidder name	3	<ul style="list-style-type: none"> ▪ A complete set of three (3) most recent years annual financial statements as detailed in this RFP

Question & Answers

QUESTION AND ANSWERS



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