

# NON-COMPULSORY BRIEFING SESSION

RFP 08 /2025

## THE APPOINTMENT OF A SERVICE PROVIDER FOR A CUSTOMER INSIGHTS PLATFORM FOR A PERIOD OF THREE (3) YEARS

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South African Revenue Service

# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
- 3.RFP Timelines
4. Background and Requirements
5. Bid Evaluation Process
6. Price & Specific goals
7. Financial Analysis
8. Services Agreements
9. RFP submission and contact details
10. Q&A

# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
- 3.RFP Timelines
4. Background and Requirements
5. Bid Evaluation Process
6. Price & Specific goals
7. Financial Analysis
8. Services Agreements
9. RFP submission and contact details
10. Q&A

# PURPOSE

## Non - Compulsory Briefing Session

- **Purpose**
  - explain selected concepts, procedures and other aspects of the RFP
  - confirm formal registration of Bidders for notices and other communications
- **It may contain**
  - additional information
  - additional rules that must be adhered to
- **It does not**
  - cover every item in the RFP
  - replace any of the issued RFP material
  - change any of the RFP rules unless explicitly communicated in writing
- **The briefing session slides**
  - The briefing session presentation may be uploaded on SARS website and E- Tender portal .

**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 questions at the end presentation; however, bidders are requested to note their questions and subsequently email them through to: [tenderoffice@sars.gov.za](mailto:tenderoffice@sars.gov.za).
  - SARS will review and focus on most pertinent themes arising from the questions and provide answers where possible
  - All questions and answers will be emailed to all the bidders as part of the wider Q & A process
  - The emailed answers will take precedence over any verbal response given in the briefing session
- The session is being recorded

# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
3. RFP Timelines
4. Background and Requirements
5. Bid Evaluation Process
6. Price & Specific goals
7. Financial Analysis
8. Services Agreements
9. RFP submission and contact details
10. Q&A

# RFP TIMELINES

ACTIVITY	DUE DATE
Bid advertisement	02 July 2025
Non- Compulsory briefing session	08 July 2025
Bidders to submit written questions on or before	02 July 2025 - 16 July 2025
SARS response to Bidder's written questions	21 July 2025
Bid Closing Date	31 July 2025 @11: 00 am
Notice to bidders	End August 2025

# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
- 3.RFP Timelines
- 4. Background and Requirements**
5. Bid Evaluation Process
6. Price & Specific goals
7. Financial Analysis
8. Services Agreements
9. RFP submission and contact details
10. Q&A



# BACKGROUND AND REQUIREMENT

The South African Revenue Service (SARS) aims to enhance voluntary compliance and modernize service delivery through data-driven strategies, as outlined in :

- ❑ Strategic Objective 5 ("Increase and expand the use of DATA") and
- ❑ Strategic Objective 6 ("Modernise the organisation's systems to provide digital and streamlined services").
- ❑ To achieve this, SARS has collected over two million taxpayer responses using its existing survey and research platform over the past several years. The platform has also been used to conduct surveys internally and externally. The insights generated from the data collected using the platform have informed improvements in service channels such as e-Filing and the MobiApp, guided taxpayer education initiatives, and supported research into compliance behaviour, taxpayer trust, employee sentiments, and the cost of compliance.
- ❑ Details regarding the scope of work for the required server are provided in the shared tender documentation and will be presented in this session.

Presentation of  
BRS by : Technical  
Specialist

# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
- 3.RFP Timelines
4. Background and Requirements
- 5. Bid Evaluation Process**
6. Price & Specific goals
7. Financial Analysis
8. Services Agreements
9. RFP submission and contact details
10. Q&A

# BID EVALUATION PROCESS

## Gate 0

Pre-Qualification



SARS RFP  
i-1-1 Main RFP Dc

- Invitation to Bid –SBD 1
- Declaration of Interest (SBD 4)
- Preference Point Claim Form – SBD 6.1
- Central Registration Report (Central Database System) from NT
- Tax Compliance Status Pin
- Supplier Risk Questionnaire
- GCC
- Annual Financial Statements

# BID EVALUATION PROCESS

## Gate 1

Technical Evaluation



SARS RFP  
5 -1-1 Main RFP Dc

- See Section 7.3 of the RFP Main Document (Technical Evaluation Criteria)

## Gate 2

Price = 80

100 points

Specific Goals = 20



SARS RFP  
5 -2-3 Standard Bidding



SARS RFP  
5 -3-1 Custom Instructions

Sworn Affidavit  
Preference Point Claim  
Form – SBD 6.1  
SARS RFP 08/2025 : Price  
Response Template

## Gate 3



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

# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
- 3.RFP Timelines
4. Background and Requirements
5. Bid Evaluation Process
- 6. Price & Specific goals**
7. Financial Analysis
8. Services Agreements
9. RFP submission and contact details
10. Q&A

# BID EVALUATION PROCESS – GATE 2: PRICE

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

## Stage 1: Price Evaluation (80 points)

Bidders must refer to Annexure B – Pricing Schedule

Adjudication Criteria	Points
Price Evaluation	80

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

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

Presentation of  
Price Template



SARS RFP  
5 -3-1 Custom Insi

# BID EVALUATION PROCESS - GATE 2: SPECIFIC GOALS

## Stage 2: Specific Goals Evaluation (20 points)

Adjudication Criteria	Points
Specific goal Evaluation	20

Presentation :  
B-BBEE  
Specialist



SARS RFP  
5 -2-3 Standard Bids

# B-BBEE EVALUATION (GATE 2)

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

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



# SPECIFIC GOALS

The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system)	Evidence Required
Entity that is at least an Empowering Supplier/ EME / QSE	2	B-BBEE certificate or Sworn Affidavit
Entity with at least 51% Black Ownership	5	B-BBEE certificate or Sworn Affidavit
Entity with at least 30% Black Women Ownership	5	B-BBEE certificate or Sworn Affidavit
The entity has at least 51% Black Youth Ownership	4	B-BBEE certificate or Sworn Affidavit
The entity is at least 51% Black Owned by Persons With Disabilities (PWD) .	4	B-BBEE certificate or Sworn Affidavit

# REQUIREMENTS FOR SPECIFIC GOALS

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

# VALID B-BBEE SWORN AFFIDAVITS

- ☐ The Department of Trade, Industry and Competition (the dtic) has designed sworn affidavit templates and qualifying measured entities must use these templates.
- ☐ Affidavits must be sworn or affirmed before a person authorized to administer the oath or take the affirmation.
- ☐ Name/s of deponent as they appear in the identity document and the identity number must be completed.
- ☐ Designation of the deponent as either the director, owner or member must be indicated in order to know that the person deposing to the sworn affidavit is duly authorised.
- ☐ The date on the affidavit is the date on which the deponent is saying that the information stated in the affidavit is true.
- ☐ The deponent must then sign the affidavit in the presence of Commissioner of Oaths. The signature of the deponent and the Commissioner of Oaths must be on the same day.
- ☐ The Commissioner must give their details on the affidavit.(Usually the commissioner stamp and signature)

**SARS reserves the right to request that bidders submit their Black ownership and turnover information in support of their Affidavits.**



South African Revenue Service

# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
- 3.RFP Timelines
4. Background and Requirements
5. Bid Evaluation Process
6. Price & Specific goals
- 7. Financial Analysis**
8. Services Agreements
9. RFP submission and contact details
10. Q&A

# FINANCIAL ANALYSIS EVALUATION

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

## **The annual financial statements must contain:**

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

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

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

# FINANCIAL ANALYSIS EVALUATION

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

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

If the bidder cannot provide the preceding year's audited / independently reviewed financial statements as part of its bid submission, the bidder should submit draft annual financial statements or its latest management accounts, together with the three (3) most recent years audited / independently reviewed annual financial statements.

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

# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
- 3.RFP Timelines
4. Background and Requirements
5. Bid Evaluation Process
6. Price & Specific goals
7. Financial Analysis
- 8. Services Agreements**
9. RFP submission and contact details
10. Q&A

# SERVICE AGREEMENTS

- ☐ The tender pack included the General Conditions of the Contract GCC
- ☐ As pre main RFP the document must be initialled and returned with the bid submission.
- ☐ Bidders must note that the SARS will share the Agreement with the recommended bidder



# TABLE OF CONTENTS

1. Welcome and Introduction
2. Governance, Rules and Procedures
- 3.RFP Timelines
4. Background and Requirements
5. Bid Evaluation Process
6. Price & Specific goals
7. Financial Analysis
8. Services Agreements
- 9. RFP submission and contact details**
10. Q&A

## Exhibit 1

### Pre-qualification documents

#### Section 1

- Pre-qualification documents (SBD documents)

#### Section 2

- Supporting documents for Mandatory responses
- 3 years audited /reviewed Financial statements

#### Section 3

- Company profile
- Supplementary information

#### Section 4

- Signed GCC



# FILE 2: ORIGINAL

## Exhibit 1

Pricing Template



## Exhibit 2

- B-BBEE Certificate/ Sworn Affidavit
- SBD 6.1

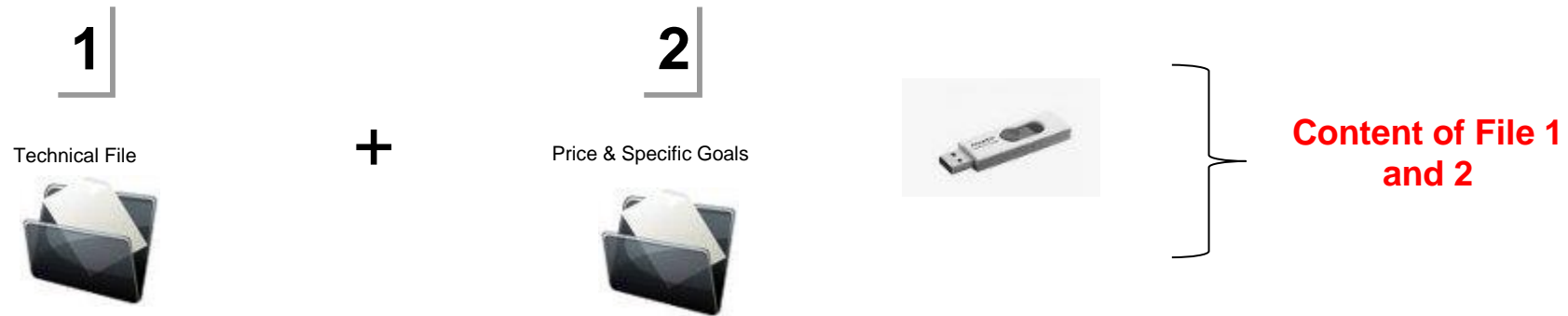


Please ensure that each file is labelled with the bidder's name and indexed properly for convenient reference during the evaluation. Additionally, the USB should also have the bidder's name clearly marked on it.

# BID SUBMISSION

Bidders must submit two files (File 1 & 2 ) and a USB with content of each file by **31 July 2025 at 11:00 .am**

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



## TENDER BOX

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



Any enquiries must be referred, in writing via email:  
[tenderoffice@sars.gov.za](mailto:tenderoffice@sars.gov.za)

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



South African Revenue Service