

BRIEFING SESSION:

RFP 15/2024: APPOINTMENT OF A PANEL OF SERVICE PROVIDERS TO PROVIDE TAX CONSULTING SERVICES TO SARS



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- 1. Welcome and Introduction**
- 2. Governance, Rules and Procedures**
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- 6. Price & B-BBEE**
- 7. Services Agreements**
- 8. RFP submission and contact details**
- 9. Q&A**

Bid Evaluation Committee

Procurement

Sourcing Lead: Professional Services – Project Oversight

Governance, Compliance & Risk Specialist

Tender Office – Bid Opening

Value Delivery Planning – Price Evaluator

B-BBEE Evaluator

SARS Business Unit

Bid Specification Committee

Technical Evaluators

Corporate Legal Services

Legal Specialist

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SARS Procurement

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 will be posted on the SARS website
- 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 published as part of the wider Q & A process
 - The published 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

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RFP TIMELINES

ACTIVITY	DATE DUE
Advertisement of Bid in the: <ul style="list-style-type: none">• National Treasury Tender Portal.• SARS website	26 August 2024
Non-compulsory virtual briefing session	04 September 2024 at 11:30
Last date for questions relating to RFP	11 September 2024
SARS to respond to bidders' written questions on or before	18 September 2024
Bid Closing Date	30 September 2024 at 11:00 am

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BACKGROUND & SCOPE OF WORK

- Refer to section 2 of the RFP document

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BID EVALUATION PROCESS

Refer to section 7 of the RFP doc

Gate 0

Pre-Qualification

- Invitation to Bid –SBD 1
- Declaration of Interest (SBD 4)
- Supplier Risk Questionnaire
- Proof of registration on the Central Supplier Database (CSD)
- General Conditions of Contract

Gate 1

Mandatory Evaluation

There is no mandatory requirement for this tender.

BID EVALUATION PROCESS Refer to section 7 of the RFP doc

Gate 2

Technical Evaluation

=

100
points

Achieve overall score of 75 out of 100
points to be considered for the
appointment in the Panel.

Refer to Annexure C: Technical Evaluation
Criteria

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Price and B-BBEE/specific goals evaluation (Gate 3)

- ✓ Price and Specific Goals will not be evaluated for the establishment of the panel however will be conducted at the RFX stage post the establishment of the panel.
- ✓ At RFX stage, SARS will negotiate the rates proposed by bidders to align them with the rates contained in the applicable SARS or National Treasury imperatives. During the utilisation of the panel, SARS will evaluate panelists on price and specific goals.
- ✓ Bidders are required to submit a valid B-BBEE certificate or sworn affidavit for the establishment of the panel.

valid B-BBEE certificate or sworn affidavit

Evidence required per entity classification

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

Valid affidavits

- 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 deponent must then sign the affidavit in the presence of Commissioner of Oaths**
- It is not permissible to backdate or postdate an affidavit. The backdating or postdating makes the affidavit misleading and irregular.
- The date on the affidavit is the date on which the deponent is saying that the information stated in the affidavit is true.
- **The signature of the deponent and the Commissioner of Oaths must be on the same day.**
- The 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.

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SERVICE AGREEMENTS

- ✓ Any award made to a bidder under this RFP is conditional, amongst other provisions, upon SARS and such bidder concluding the Master Services Agreement within the time frame indicated in the letter of award. For the sake of consistency and fairness, the terms and conditions of the Master Services Agreement annexed to this RFP will be binding on the panelists and will not be subject to negotiation.
- ✓ If the recommended bidder(s) fails to sign the Master Services Agreement within the time frame stipulated, SARS reserves the right to:
 - ❖ cancel the award to the recommended bidder;
 - ❖ take any other action SARS deems reasonable and appropriate.
- ✓ No service provider will be invited to an RFX process, unless they have signed the Master Service Agreement
- ✓ A bidder should note that SARS relies upon the bidder's proposal as a material representation in making an award to a successful bidder and in concluding an agreement with the bidder. It follows therefore that any misrepresentations in a proposal may result in legal action or other processes by SARS against the bidder, notwithstanding the conclusion of the Master Services Agreement between SARS and the bidder for the provision of the goods and services in question.

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BID SUBMISSION

Bidders must submit copies of each file (Original and Duplicate) and a USB with content of each file by the
30 September 2024 at 11:00

Bid documents will only be considered if received by SARS before the Closing Date and time, regardless of the method used to send or deliver such documents to SARS



TENDER BOX

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

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

FILE 1: ORIGINAL / DUPLICATE

Exhibit 1

Pre-qualification documents

- SBD documents and other documents (e.g. BBBEE certificate)



Exhibit 2

Technical Response

- Response to technical requirements
- Supporting documents for technical requirements



Exhibit 3

- Company profile
- Supplementary information



Exhibit 4

Draft Services Agreement

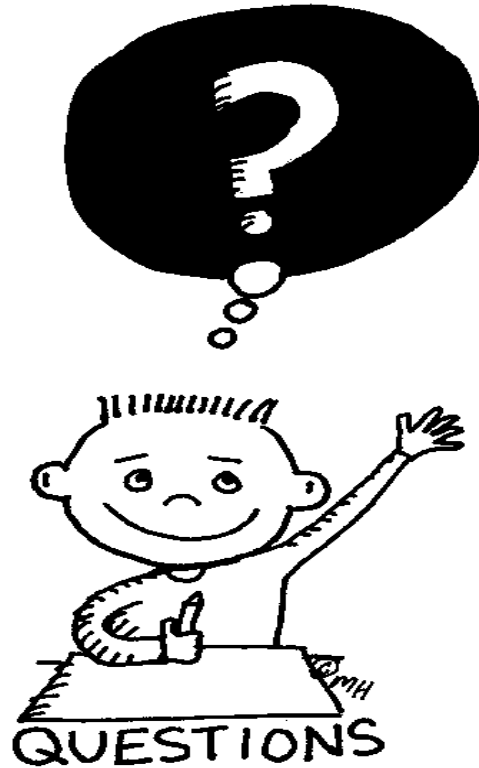
- General Conditions of Contract
- Draft Services Agreement



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QUESTION AND ANSWERS



**Thank you
Re a Leboha
Re a leboga
Ndza Khensa
Dankie
Ndi a livhuwa
Ngiyabonga
Enkosi
Ngiyathokoza**

