

NON - COMPULSARY BRIEFING SESSION

Appointment of a service provider for the Acquisition of eDiscovery Tool

DATE : 16 January 2026

RFP NO : RFP 31-2025

CLOSING DATE : 30 January 2026 AT 11:00 AM

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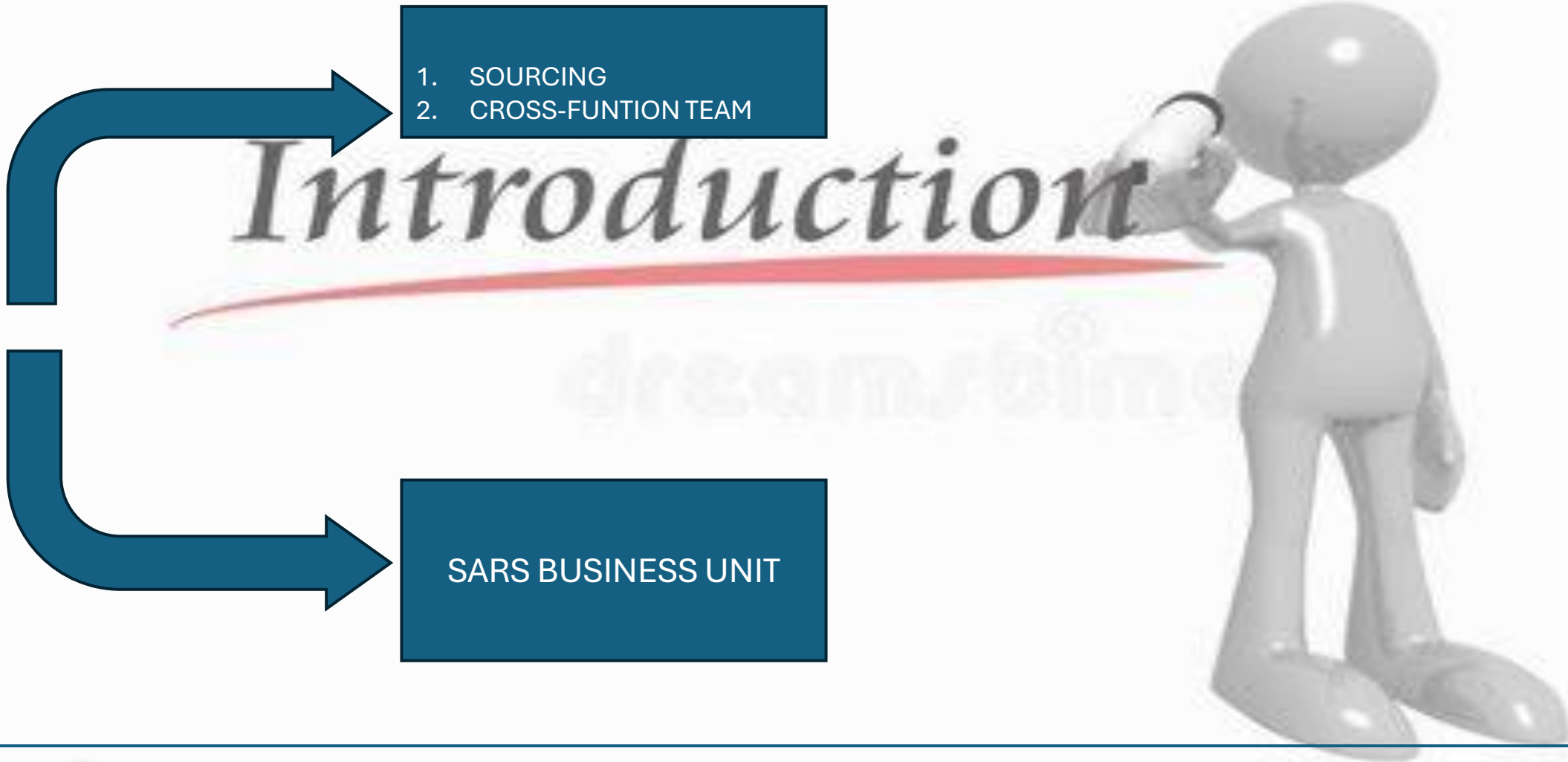
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INTRODUCTION: SARS TEAM



Purpose

The purpose of Non-Compulsory Briefing Session is to:

- ☐ 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 questions submitted at the end of the session
- ✓ SARS will review and focus on most pertinent themes arising from the questions and provide answers where possible
- ✓ Bidders are requested to submit written questions during the open Q&A period to Tender Office email published
- ✓ 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**

Governance Requirements

- **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

ACTIVITY	DATE DUE
Issuing of the RFP:	12 December 2025
Non-Compulsory virtual briefing session	16 January 2026 at 10h00 PM
Bidders to submit written questions	12 December 2025 to 21 January 2026
SARS response to Bidder's written questions	09 January 2026 to 23 January 2026
RFP Closing Date	30 January 2026 at 11h00 A.M

BACKGROUND AND BUSINESS REQUIREMENT

Bidders are requested to refer to the issued,
SARS RFP 31/2025, 2-1 Business
Requirement Specification, for purposes
of understanding the SARS business
requirement for this tender:

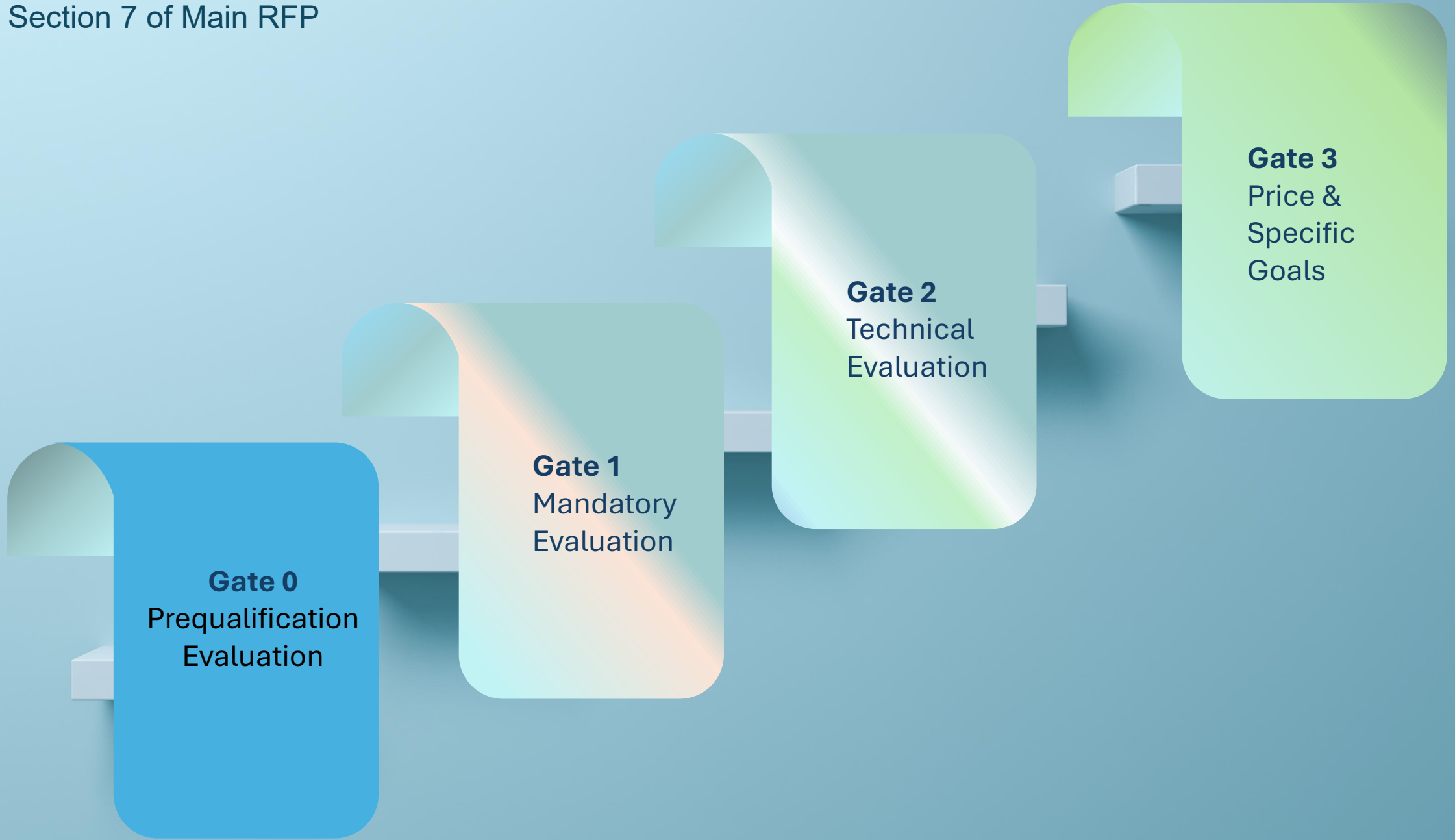


Adobe Acrobat
Document



BID EVALUATION PROCESS

Refer to Section 7 of Main RFP



PREQUALIFICATION EVALUATION STAGE

Gate 0

**Pre-Qualification
Evaluation**

- SBD 1: Invitation to Bid
- SBD 4: Bidder's Declaration
- SBD 6.1: Preference points claim form
- Proof of registration on the Central Supplier Database (CSD)
- Supplier Risk Questionnaire
- General Conditions of Contract (GCC)
- A complete set of three (3) most recent years annual financial statements

MANDATORY EVALUATION STAGE

Gate 1



Microsoft Word
Document

**Mandatory
Evaluation**

- If a bidder does not meet any of the mandatory evaluation criteria, the bidder will be disqualified, and the bidder's proposal will not be evaluated further

NB: All bidders are required to complete, sign, and return the issued SARS RFP 31-2025 5-1 Mandatory Response Template for the purpose of mandatory evaluation criteria.

TECHNICAL EVALUATION STAGE

Gate 2

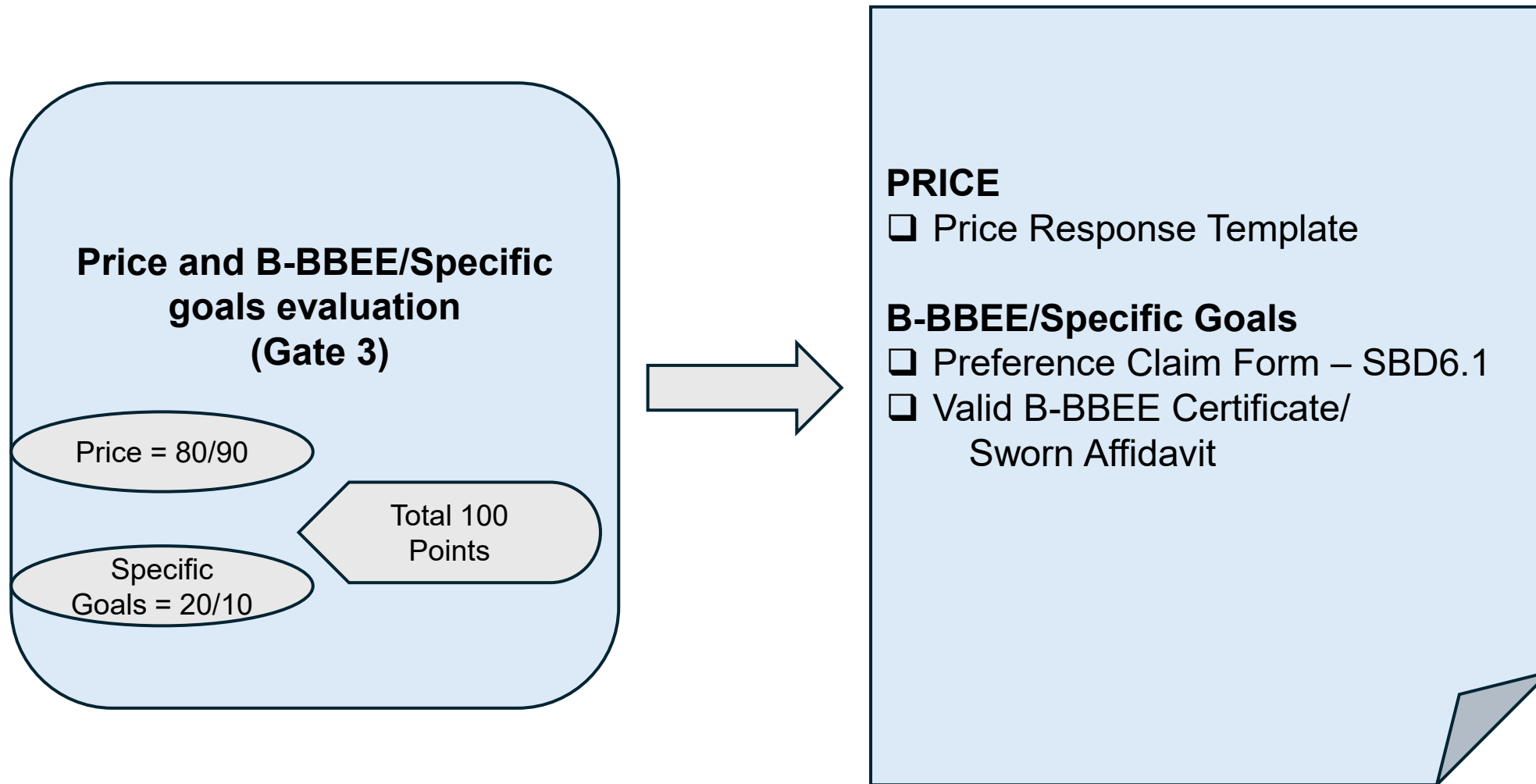
Technical Evaluations



Microsoft Excel
Worksheet

- The technical evaluation will be scored out of a total of 100 points, and bidders are required to score a minimum threshold of **66.67 out of 100** points to proceed to the next stage of evaluation.
- If a bidder does not meet the technical evaluation minimum threshold, the bidder will be disqualified, and the bidder's proposal will not be evaluated further

PRICE & SPECIFIC GOALS EVALUATION



SPECIFIC GOALS EVALUATION POINTS AND EVIDENCE

Specific goals evaluation Criteria	Maximum Points that may be awarded
Bidders to submit: a) A duly completed SBD 6.1 Preference point claim form, and b) A valid B-BBEE certificate or affidavit.	20/10

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
- Section 1.6 SBD 6.1 states.. 1.6 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.

VALID AFFIDAVITS

- Affidavits must be sworn or affirmed before a person authorized to administer the oath or take the affirmation.
- 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 to submit their Black ownership and turnover information in support of their Affidavits.

B-BBEE Certificate/Affidavit

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

Classification	Turnover	Submission Requirement
Exempted Micro Enterprise (EME)	Below R10 million p.a	A sworn Affidavit or Certificate from CIPC
Qualifying Small Enterprise (QSE)	Between R10 million and R50 million p.a.	A sworn Affidavit – only 51% BO and above Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency.
Large Enterprise (LE)	Above R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency.

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 (80/90 points)

Bidders are requested to refer to the issued, **SARS RFP 31/2025 5-1 Price Template**, for purposes of understanding, filling in and signing off the Price Template for this tender:

Adjudication Criteria	Points
Price Evaluation	80/90



FINANCIAL ANALYSIS

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;

FINANCIAL ANALYSIS

- 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.

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.

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

SERVICE AGREEMENT

Bidders should note that, SARS issued a General Condition of Contract (GCC) and that Bidders would be expected to sign off and submitted the GCC.

Bidders should however note that, the appointed Bidder would then be given a draft Contract where they would then be expected to:

- ☐ Comment on the terms and conditions set out in the Services Agreement and where necessary, make proposals to the terms and conditions;
- ☐ Each comment and/or amendment must be explained; and
- ☐ All changes and/or amendments to the Services Agreement must be in an easily identifiable colour font and tracked for ease of reference.
- ☐ SARS reserves the right to accept or reject any or all amendments or additions proposed by the successful bidder if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

RFP submission and contact details

- Bidders must submit one (1) hard copy file and a USB with content of each file. **Refer to paragraph 6.5 of the Main RFP document**



TENDER BOX

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

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

QUESTION AND ANSWERS



Thank you

Rea leboha

Re a leboga

Ndza Khenza

Dankie

Ndi a livhuwa

Ngiyabonga

Enkosi

Ngiyabonga



South African Revenue Service