

**REFERENCE: RFP 05/2022**

**REQUEST FOR PROPOSAL**

**APPOINTMENT OF SERVICE PROVIDER(S) FOR  
THE PROVISION OF PAPER PRODUCTS FOR A  
PERIOD OF THREE (3) YEARS NATIONWIDE**

## SUMMARY, GUIDELINES, CONDITIONS AND INSTRUCTIONS

### 1 STRUCTURE OF THE RFP PACK

The South African Revenue Service (“SARS”) invites certain qualified persons (“Bidders”) to submit proposals (“Tenders”) in accordance with the rules set out in this RFP for appointment of a qualified service providers for the provision of supply and delivery of paper products on a regional and/ or national basis for a period of three (3) years on an “as and when” required basis. Refer to Annexure B which indicates the four (4) regions of this tender.

#### STRUCTURE

This RFP Pack is divided in 4 (four) sections consisting of one or more documents in each section.

**Table 1: RFP Structure**

Section	Description of Section Contents
1.	Documents outlining the RFP background, conditions, instructions.
2.	Standard Bid Documents (SBDs). These documents are required by SARS Procurement and National Treasury to be read, signed and to be returned as part of the Bidder’s Tender response.
3.	Documents outlining the business requirements, technical requirements and other information required by the Bidder to submit a Tender response.
4.	Response templates. Templates that are required to form part of the Bidder’s Tender response.

### 2 KEY DATES AND ACTIVITIES

This RFP bidding process is valid for a period of one hundred and eighty (180) calendar days from the closing date. Consequently, bidders undertake to submit quantitated prices that are valid for a period of one hundred and eighty (180) calendar days from the closing date.

The table below lists certain key dates and activities relevant from time of issuance of the RFP up to and until the Closing Date:

**Table 2: Tender Timelines**

No	Description	Date/Time
1.	Advertisement of the Bid on National Treasury and SARS website	21 June 2022
2.	Tender Documents on SARS website	21 June 2022
3.	Bidders to submit written questions	22 June - 05 July 2022
4.	Tenders due (“ <b>Closing Date and time</b> ”)	20 July 2022 @ 11:00

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All dates and times in this RFP are South African Standard Time.

Any time or date in this RFP is subject to change at SARS' discretion. The establishment of a time or date in this RFP does not create an obligation on the part of SARS to take any action, or create any right in any way for any bidder to demand that any action be taken on the date established, or on any other date. The bidders accepts that; if SARS extends the deadline for RFP submission for any reason, the requirements of this RFP otherwise apply equally to the extended deadline.

### **3 SARS' REQUIREMENTS**

#### **3.1 Introduction**

SARS' mandate under the South African Revenue Service Act, 1997 (Act No. 34 of 1997) includes the collection of all revenues that are due, ensuring maximum compliance with revenue legislation and providing a customs service that will maximise revenue collection, facilitate trade and protect the borders of South Africa. SARS' vision is to be an innovative revenue and customs agency that enhances economic growth and social development and supports South Africa's integration into the global economy in a way that benefits all citizens. SARS strives to exercise its mandate in an efficient and cost effective manner.

#### **3.2 Overview of SARS Requirements**

The objective of this bid is to appoint service provider(s) for the provision of paper and paper related products, nationwide for a period of three (3) years. Details of the required services is contained in the specification document, attached as annexure A.

Where there is conflict between the Specification and/or any documentation published along with this document. The Provisions of this document take precedence.

### **4 SARS' APPROACH TO THIS RFP**

#### **4.1 Objectives**

SARS' primary objective in issuing this RFP is to conclude a service agreement with successful bidder/s that will achieve the following:

**4.1.1** best value for money;

**4.1.2** the sustainable supply of paper products; and

**4.1.3** the meeting of SARS' current requirements (at a minimum) and providing for flexibility to meet SARS' future needs related to the scope.

## **5 BIDDING QUALIFICATION**

### **5.1 Introduction**

SARS has a detailed evaluation methodology premised on Treasury Regulation 16A3 of the Public Finance Management Act, 1999. (Act No. 1 of 1999), which prescribes that SARS' procurement processes be:

- 5.1.1** economical, efficient, fair, equitable, transparent, competitive and cost effective;
- 5.1.2** consistent with the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000), Preferential Procurement Regulations, 2017 and
- 5.1.3** consistent with the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003).

### **5.2 Central Supplier Database ("CSD")**

- 5.2.1** Service Providers and suppliers who wish to render services to SARS will no longer register at SARS directly. Suppliers will have to register on National Treasury Central Supplier Database ("CSD") as per National Treasury Circular No 3 of 2015/2016 – Central Supplier Database.
- 5.2.2** National Treasury will maintain the database for all suppliers for Government and its institutions.
- 5.2.3** All existing and prospective suppliers are requested to self- register on the CSD by accessing the National Treasury website at [www.CSD.gov.za](http://www.CSD.gov.za).
- 5.2.4** As part of the bid submission, bidders are required to submit their CSD number with their tender submission.

### **5.3 Bidding Qualification**

- 5.3.1** Prospective bidders who cannot, or do not, satisfy all of the conditions contained in paragraphs 5.3.1.1 to 5.3.1.3 should not submit bid proposals. If a bidder is found not to meet any one of the requirements listed in paragraphs 5.3.1.1 to 5.3.1.3, then that bidder's tender will be rejected without any further consideration, at SARS' sole discretion.
  - 5.3.1.1** A bidder must be a South African entity (Company, Close Corporation, Sole Proprietor or individual) or have a local branch office in South Africa.
  - 5.3.1.2** The bidder must be fully tax compliant. The bidder's attention is further drawn to the requirement that the successful bidder must ensure that it remains compliant with all South African Tax and Customs Laws and Regulations throughout the Term of the contract, and failure to do so will be a material breach of the Agreement.
  - 5.3.1.3** The Bidder must comply with all applicable legislation in the Republic of South Africa in the performance of its daily activities, including but not limited to labour legislation

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and bargaining council agreements, health and safety regulations and environmental laws.

- 5.3.2** Subject to sub-paragraph 5.3.4.2 below, SARS will disqualify any bidder who either itself or any of whose members (save for such members who hold a minority interest in the Bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the Bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of SARS or any other government organ or entity and whether from the Republic of South Africa or otherwise ("Government Entity"):
- 5.3.2.1** engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other Bidder in respect of the subject matter of this RFP;
  - 5.3.2.2** seeks any assistance, other than assistance officially provided by a Government Entity, from any employee, advisor or other representative of a Government Entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
  - 5.3.2.3** makes or offers any gift, gratuity, anything of value or other inducement, whether lawful or unlawful, to any of SARS' officers, directors, employees, advisors or other representatives;
  - 5.3.2.4** makes or offers any gift, gratuity, anything of any value or other inducement, to any Government Entity's officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
  - 5.3.2.5** accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a Government Entity;
  - 5.3.2.6** pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, that is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a Government Entity;
  - 5.3.2.7** has in the past engaged in any matter referred to in sub-paragraphs 5.3.2.1 - 5.3.2.6 foregoing; or
  - 5.3.2.8** has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such bidder, member or director's name not specifically appearing on the List of Tender Defaulters kept at National Treasury.
- 5.3.3** SARS will reject a bidder's tender without any further consideration where that bidder makes culpable misrepresentation to SARS in its tender or at any stage during this RFP process.

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### **5.3.4 SARS may disqualify a bidder who:**

#### **5.3.4.1** whose tender contains a misrepresentation;

#### **5.3.4.2** in respect of whom any of the members (save for such members who hold a minority interest in the bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the bidder other than through shares listed on a recognised stock exchange), directors or members of senior management are not in full compliance with all applicable laws relating to taxation in South Africa, in which regard SARS further reserves the right to require the bidder to submit a valid tax clearance certificate in respect of any one or more such persons;

#### **5.3.4.3** whom SARS considers to be directly or indirectly owned, controlled or managed by persons who are not acceptable to SARS from an ethical, business or governance perspective;

#### **5.3.4.4** who had access to any of SARS' proprietary information or any other matter that may have unfairly placed that bidder in a preferential position in relation to any of the other Bidders;

#### **5.3.4.5** who materially fails to comply with any conditions or requirements of this RFP;

#### **5.3.4.6** who in SARS' opinion has either materially failed to comply with any of the conditions of any existing or past agreement between such bidder and SARS or who has performed unsatisfactorily under any such agreement; or

#### **5.3.4.7** who fails to respond as required to written notices given by SARS in connection with its Tender under this RFP.

### **5.4 Bidding Submission**

Bids must be properly received and deposited in the below mentioned tender box on or before the closing date and before the closing time at the Tender Submission Office situated at:

SARS Procurement Centre  
Lehae La SARS  
299 Bronkhorst Street,  
Nieuw Muckleneuk,  
Brooklyn, **PRETORIA**

#### **5.4.1** Bid documents may either be posted to The Tender Office - SARS Procurement Department, Lehae la SARS, 299 Bronkhorst Street, Nieuw Muckleneuk, Brooklyn, **PRETORIA** OR placed in the tender box at the main entrance at the aforesaid address.

#### **5.4.2** Bid documents will only be considered if received by SARS on or before the closing date and time, regardless of the method used to submit, send or deliver such documents to SARS.

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- 5.4.3** Late tenders will not be accepted and shall be recorded by the Tender Office as such.
- 5.4.4** In this RFP document the terms “shall” and “must” indicate a mandatory requirement. Bidder compliance with mandatory requirements is essential. Failure to comply with such requirements can lead to the disqualification of a Bidder. The terms “should” or “may” indicate desirable or advisory requirements. Bidder compliance with such terms may lead to an increase in a Bidder’s technical score.
- 5.4.5** All tenders and supporting documentation must be submitted in English.
- 5.4.6** All costs incurred during the preparation and compilation of a bidder’s proposal, as well as the delivery of a bidder’s tender documents to SARS will be borne exclusively by the bidder.

## **EVALUATION AND SELECTION**

### **5.5 Process after Closing Date**

After the Closing Date in paragraph 2 (Key Dates)

- 5.5.1** SARS may request clarification or verification in respect of any information contained in or omitted from a bidder’s tender, which SARS may do either in writing or at a meeting convened with the Bidder for that purpose;

SARS may conduct a due diligence on any Bidder, which may include interviewing customer references or performing other activities to verify a bidder’s submitted or other information and capabilities (including visiting the bidder’s various premises and/or production sites to verify certain stated facts or assumptions) and in which regard the Bidder will be obliged to provide SARS with all such access, assistance and/or information as SARS may reasonably request. The bidder shall respond within the timeframes set by SARS, failing which SARS reserves the right not to consider the bidder’s tender any further;

- 5.5.2** SARS may shortlist bidders and may request presentations from such short-listed bidders. All costs relating to the preparation of such presentations will be borne by the bidders;
- 5.5.3** SARS may enforce whatever measures it considers necessary to ensure the confidentiality and integrity of the contents of the respective tenders;
- 5.5.4** SARS will evaluate the tenders with reference to SARS’ evaluation criteria. SARS reserves the right to employ subject matter experts to assist in performing such evaluations.

### **5.6 SARS’ Pre-qualification Criteria – Gate 0**

- 5.6.1** SARS has defined minimum pre-qualification criteria that must be met by the bidder in order for SARS to accept a tender for evaluation. In this regard a pre-evaluation

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verification will be carried out by SARS in order to determine whether a tender complies with the provisions of paragraphs 6.2.

**5.6.2** Where there is a failure to comply fully with any of the pre-qualification criteria, or SARS is for any reason unable to verify whether the pre-qualification criteria are fully complied with, SARS will have the right to either:

**5.6.2.1** reject the tender in question and not to evaluate it at all;

**5.6.2.2** give the bidder an opportunity to supplement the information and/or documentation provided by it under its tender so as to achieve full compliance with the pre-qualification criteria, provided that such information and/or documentation can be provided within a period of 5 (five) working days and is purely administrative in nature;

**5.6.2.3** in any event permit the tender to be evaluated, subject to the outstanding information and/or documentation being submitted prior to the award of the tender.

**5.6.3** The bidder's attention is drawn to the following documents which are required as part of a bidder's tender and which, if omitted, may at SARS' sole discretion result in that tender being disqualified:

**Table 3: Prequalification Supporting Documents**

No.	Name of the document that must be submitted	Non-submission may result in disqualification?
1.	Invitation to bid – SBD 1	YES – Please complete and sign the supplied pro forma document.
2.	Declaration of Interest – SBD 4	YES - Please complete and sign the supplied pro forma document.
3.	SBD 6.1 – Preference Point Claim Form	YES - Please complete and sign the supplied pro forma document
4.	Supplier Cost and Risk Assessment Questionnaire	YES - Please complete and sign the supplied pro forma document.
5.	CSD report	YES - Must accompany bid submission
6.	Pricing template(s) per region(s) bidding for	YES - Must accompany bid submission for applicable regions(s) bidding for
7.	A complete set of audited / independently reviewed annual financial statements for the three (3) most recent financial periods in the name of the bidding entity. <ul style="list-style-type: none"><li>• Statement of changes in equity / net assets' AND</li><li>• Accompanying Notes</li></ul>	YES - Please submit complete sets of audited or independently reviewed annual financial statements as detailed in this RFP



## 5.7 SARS Mandatory Evaluation Criteria – Gate 1

- 5.7.1** Only Bidders that have met the Pre-Qualification Criteria in Gate 0 will be evaluated in Gate 1 for mandatory evaluation. The table below contains the mandatory evaluation criteria that are specific to this RFP. If the 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.
- 5.7.2** The bidder should be aware that any other requirement that is indicated as a mandatory requirement in this or any other document in this RFP pack may also serve as a prequalification requirement unless stated otherwise.

**Table 4: Mandatory Evaluation Criteria**

NO	CRITERIA	Non-submission will result in disqualification
1.	<b>Bidder(s) must be either an Exempted Micro Enterprise (EME) or a Qualifying Small Enterprise (QSE)</b>	Yes - Please submit a valid B-BBEE Certificate or sworn affidavit (template provided).

## 5.8 SARS Technical Evaluation Criteria – Gate 2

- 5.8.1** Only bidders that have met mandatory requirements (Gate 1) will be evaluated in gate 2 for technical evaluation criteria.
- 5.8.2** SARS' technical evaluation of tenders includes testing the bidder's functionality and capability of delivering the required goods and/or services in accordance with the technical evaluation criteria listed in the table below.
- 5.8.3** The Bidder(s) must score a minimum threshold of sixty-five (65) points out of 100 points for technical evaluations to proceed to Gate 2: Price and B-BBEE evaluations stage.

**Table 5: Technical Evaluation Criteria**

NO	CRITERIA	MEASURE	WEIGHT
1.	<b>Paper product Sources</b>	All paper products supplied under this contract are sourced from responsible sources and conform with the Forest Stewardship Council (FSC standards C019831 ( <a href="http://www.fsc.org">www.fsc.org</a> )) -	15 points

NO	CRITERIA	MEASURE	WEIGHT
		<ul style="list-style-type: none"> <li>• Yes – 15 points;</li> <li>• No – 0 points</li> </ul>	
2.	<b>Bidder's schedule of Experience – Reference letters</b>	<p>Bidder should have a minimum of 4 contactable reference letters to score maximum points, for the supply of paper products or stationery or copy of contracts confirming the performance of the bidders in the recent 5 years. References may be checked by SARS to ensure that the contract was performed at the agreed time, quality and within budget:</p> <p>Points will be allocated as follows:</p> <ul style="list-style-type: none"> <li>• 4 or more satisfactory reference letters/ contracts – 20 points;</li> <li>• 3 satisfactory reference letters/ contracts – 15 points;</li> <li>• 2 satisfactory reference letters / contracts – 10 points</li> <li>• 1 satisfactory reference letters/ contracts – 5 points; and</li> <li>• No reference letters/ contracts provided - 0 points</li> </ul>	20 points
3.	<b>Regional footprint</b>	<p>Bidder must submit list of outlets or depots with contactable references to demonstrate existence for the Regional footprint as defined in this bid document) for each region(s) they are bidding for.</p> <p>Points will be allocated as follows:</p> <ul style="list-style-type: none"> <li>• Submitted – 20 points;</li> <li>• Not submitted – 0 points</li> </ul>	20 points
4.	<b>Regional footprint</b>	<p>Bidder must submit Proof of Municipality Statement or Lease agreement to demonstrate existence of regional footprint for each region the bidder is bidding for.</p> <ul style="list-style-type: none"> <li>• Submitted – 20 points;</li> <li>• Not submitted – 0 points</li> </ul>	20 points

NO	CRITERIA	MEASURE	WEIGHT
5.	<b>Delivery Plan</b>	<p>Bidder to submit the detailed plan indicating the delivery turnaround time after receipt of the order to the delivery for each region they are bidding for:</p> <p>Points will be allocated as follows:</p> <ul style="list-style-type: none"> <li>• Delivery time is 5 working days and less - 25 points;</li> <li>• Delivery time is 6 working days and less than 10 working days - 20 points;</li> <li>• Delivery time is 11 working days and less than 20 working days - 15 points;</li> <li>• Delivery time is 20 working days and less than 30 working days – 10 points; and</li> <li>• Delivery time more than 30 working days or not indicated – 0 points</li> </ul>	25 points
	<b>TOTAL</b>		<b>100 points</b>
	<b>THRESHOLD</b>		<b>65 POINTS</b>

### 5.9 SARS' Pricing and B-BBEE Evaluation – Gate 3

**5.9.1** In line with the requirements of the Preferential Procurement Policy Framework Act, 2000, and its Regulations, only bidders that have met or exceeded the minimum threshold for functionality in the technical evaluation, will be evaluated further in terms of the prescribed preference point system.

Criterion	Points
B-BBEE status	20
Price	80

#### 5.9.2 Stage 1 – Price Evaluation (80 points).

**5.9.2.1** Points for the price evaluation will be calculated in accordance with the formula stated below in the Preferential Procurement Regulations. The price of the bidder's proposal will be calculated over the anticipated term of the agreement.

**5.9.2.2** The bidders are required to complete all line items in the pricing response template provided by SARS, which will be used for the price evaluation. The price should be all-inclusive for all the goods and services required in the scope of work, and the bidders must ensure the completeness and accuracy of the pricing figures provided in the pricing response template. Failure to complete

the pricing response template may lead to disqualification of the bidder.

Adjudication Criterion	Points
Price Evaluation  $P_s = 80 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	80

Where:

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

### 5.9.3 Stage 2 – B-BBEE Evaluation (20 points)

- 5.9.3.1** Points for the B-BBEE evaluation will be allocated in accordance with the bidder's B-BBEE status claimed. Points for B-BBEE can only be awarded to a bidder who submits a valid B-BBEE certificate or sworn affidavit together with the Preference points claim form.
- 5.9.3.2** Failure of the bidder to submit a B-BBEE certificate from a verification agency accredited by the South African Accreditation System (SANAS), a CIPC B-BBEE Certificate for Exempted Micro Enterprise (EME), or a sworn affidavit confirming annual turnover and level of black ownership in the case of an Exempted Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) together with the proposal, will be interpreted to mean that preference points for B-BBEE are not claimed.
- 5.9.3.3** The checklist below indicates the B-BBEE documents that must be submitted for this Bid, failure to submit will result in scoring zero for B-BBEE

Adjudication Criterion	Points
B-BBEE Evaluation:  Submission of a duly completed SBD 6.1 preference claim form and a valid B-BBEE Certificate/ Sworn Affidavit	20

Classification	Turnover	Submission Requirement
Exempted Micro Enterprise	Below R10 million p.a.	Sworn affidavit or a certificate from the Companies or Companies Intellectual Property Commission

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(EME)		("CIPC") letter
Qualifying Small Enterprise (QSE)	Between R10 million and R50 million p.a.	Sworn affidavit – Only 51% Black Owned (BO) and above, or certified copy of a B-BBEE Rating Certificate from a SANAS accredited rating agency.
Large Entity (LE)	Above R50 million p.a.	Certified copy of a B-BBEE Rating Certificate from a SANAS accredited rating agency.

Failure on the part of a bidder to submit proof of B-BBEE Status level of contributor together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

Bidders who do not claim preference points will be scored zero for B-BBEE but cannot be excluded from the tender process.

### **Use and acceptance of Affidavits**

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

### **Joint Ventures and Consortiums**

A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

### **Proof of Existence: Joint Ventures and/or Sub-Contracting**

Bidders must submit concrete proof of the existence of joint ventures and/or sub-contracting arrangements. SARS will accept signed agreements as acceptable proof of the existence of a joint venture and/or sub-contracting arrangement.

The joint venture and/or sub-contracting agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or sub-contracting party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or sub-contracting arrangement.

## **5.10 Financial analysis**

### **5.10.1 SARS may conduct a financial analysis on all or some of the qualifying bidders.**

- 5.10.2** The bidders are required to submit the public interest score (PIS) 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 annual financial statements must contain:
- 5.10.2.1** A statement of profit and loss and other comprehensive income;
  - 5.10.2.2** A statement of financial position;
  - 5.10.2.3** A statement of cash flows
  - 5.10.2.4** Statement of changes in equity / net assets; and
  - 5.10.2.5** Accompanying notes.
- 5.10.3** Bidders who have been trading for less than three (3) financial periods must provide:
- 5.10.3.1** A letter detailing the fact, signed by a duly authorised representative of the entity;
  - 5.10.3.2** The annual financial statements that the entity is able to provide, taking into account the period that it has been trading; and
  - 5.10.3.3** Any other information or documentation which would provide more clarity on the financial history of the bidder.
- 5.10.4** If the bidder is a subsidiary of a holding company and submits the financial statements of the holding company for financial analysis purposes, the holding company is required to furnish a performance guarantee that is signed by a duly authorised representative of the holding company, stating the holding company will undertake to cover any or all risks associated with the bidder, in the event the bidder is awarded the RFP.
- 5.10.5** In the event of the bid being in the form of a Joint Venture (JV), the following is required:
- 5.10.5.1** Annual financial statements of the JV; and
  - 5.10.5.2** JV legal agreement detailing the percentage ownership of each entity
  - 5.10.5.3** Unincorporated JV's should submit separate financial statements for each party in the JV and a signed JV legal agreement.
- 5.10.6** SARS reserves the right to request further information with regards to the annual financial statements of a bidder at a later stage.

## **5.11 Process following evaluation**

- 5.11.1** Following SARS' evaluation of the bidders' proposals, SARS has the right to, *inter alia*, in its sole discretion:
- 5.11.1.1** conduct a risk assessment of a bidder's capability to deliver the goods and perform the services in accordance with the specified service levels and/or achieve SARS' objectives;
  - 5.11.1.2** request additional information, clarification or verification in respect of any

information contained in or omitted from a bidder's proposal, which SARS may do either in writing or at a meeting convened with the bidder for that purpose;

- 5.11.1.3** conduct a due diligence on any bidder or its subcontractor, which may include interviewing customer references or performing other activities to verify information and capabilities submitted, claimed, or otherwise, (including visiting the bidder's, subcontractor's, or customer reference premises, sites and/or facilities to verify certain stated facts or assumptions). The bidder will be obliged to grant SARS with all such access, assistance and/or information as SARS may reasonably request. The bidder must respond within the timeframes set by SARS, failing which SARS reserves the right not to consider the bidder's proposal any further;
- 5.11.1.4** request presentations from such short-listed bidders. All costs relating to the preparation of such presentations will be borne by the bidders; and/or
- 5.11.1.5** take any other action it deems appropriate.

## **5.12 Acceptance of RFP conditions**

The Bidder's participation in the RFP process is deemed to constitute acknowledgement and acceptance by the Bidder of the terms and conditions contained in this RFP.

## **5.13 Conditions applicable to appointment**

- 5.13.1** Bidders are encouraged to support the development and employment of Historically Disadvantaged People.
- 5.13.2** The tender intends to award one (1) service provider per region based on Price and B-BBEE outcome, however SARS reserves the right to change the award to more than one region to a service provider in an event it is not cost effective to do so.
- 5.13.3** Any award made to a bidder(s) under this RFP is conditional, amongst other provisions, upon SARS and such bidder(s) concluding a written agreement, as well and the bidder signing the SARS' oath/affirmation of secrecy document.

## **5.14 Reservation of rights**

SARS reserves the right in its discretion to:

- 5.14.1** make no award;
- 5.14.2** withdraw, suspend or cancel this RFP or the RFP process at any time and without providing reasons;
- 5.14.3** change the award to more than one region to a service provider in an event it is not cost effective to do so.

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- 5.14.4** not provide reasons for its rejection or the failure of any Bidder or Tender, save on application and in terms of applicable legislation;
- 5.14.5** change any of its requirements as set out in this RFP by giving Bidders reasonable notice;
- 5.14.6** change any condition, procedure or rule of the RFP by giving Bidders reasonable notice;
- 5.14.7** amend, vary, or supplement any of the information, terms or requirements contained in this RFP, any information or requirements delivered pursuant to this RFP, or the structure of the RFP process;
- 5.14.8** re-advertise for Tenders;
- 5.14.9** provide further information in respect of, and modify the provisions of, this RFP at any time prior to the Closing Date by notice to all prospective Bidders;
- 5.14.10** conduct site visits and/or perform audits whenever SARS deems it prudent to do so;
- 5.14.11** undertake further checks on Bidders, which may include information on public record or in the public domain, information contained in internal SARS records or information received from other government institutions;
- 5.14.12** no longer consider a Bidder's Tender where adverse information about the Bidder or its Tender submission has come to the attention of SARS, provided that such Bidder is informed accordingly and invited to comment;
- 5.14.13** to award a Tender based on which Bidder is offering the best value for money, even if such Tender is not the lowest priced tender; and
- 5.14.14** To make the award subject to the successful Bidder entering into a duly signed contract with SARS.
- 5.14.15** purchase paper products in terms of this tender on an "as needed basis" only. no specific quantities are guaranteed under this tender.

## **5.15 VALIDITY OF INFORMATION**

SARS has made reasonable efforts to ensure the accuracy of the information contained in this RFP. However, neither SARS, nor its employees, officers, advisers or agents will be liable to the bidder or any third party for any inaccuracy, the omission of any information in the RFP or in respect of any additional information SARS may provide to the Bidder as part of the RFP process.

The bidder is deemed to have examined this RFP and any other information supplied by SARS to the Bidder and to have satisfied itself before submitting any of its responses as to the correctness and sufficiency of such information.



**5.16 RFP NOT AN OFFER**

This RFP does not constitute an offer to do business with SARS, but merely serves as an invitation to Bidders to facilitate a requirements-based decision process.

Nothing in this RFP or any other communication made between SARS (including its officers, directors, employees, advisers and representatives) is a representation that SARS will offer, award or enter into a contract with the Bidder.

**5.17 PREPARATION COSTS**

The bidder will bear all its costs in preparing, submitting and presenting any response or tender to this RFP and all other costs incurred by it throughout the RFP process. Furthermore, no statement in this RFP will be construed as placing SARS, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidders in the preparation of their response to this RFP.

**5.18 CONFLICT OF INTEREST**

If at any time the bidder identifies an actual or potential conflict of interest, the bidder must immediately notify SARS in writing. SARS reserves the right to exclude the tender submitted by such bidder from further consideration, unless the Bidder is able to resolve the conflict. In addition, if it comes to SARS's knowledge that there was indeed a conflict of interest or a potential conflict of interest, same will be grounds for the immediate disqualification of the bidder.

**5.19 INDEMNITY**

If a bidder breaches the conditions of this RFP and, as a result of that breach, SARS incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the RFP process and/or enforcement of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds SARS harmless from any and all such costs which SARS may incur and for any damages or losses SARS may suffer.

**5.20 PRECEDENCE**

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this document by reference.

**5.21 RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL**

A bidder is responsible for ensuring that its sub-contractors (if any), personnel (including officers, directors, employees, advisors and other representatives of a Bidder) and personnel of its sub-contractors comply with all terms and conditions of this RFP. In the event that SARS allows a bidder to make use of sub-contractors, such sub-contractors will

## **SARS CONFIDENTIAL**

at all times remain the responsibility of the bidder and SARS will not under any circumstances be liable for any losses or damages incurred by such sub-contractors.

### **5.22 CONFIDENTIALITY**

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this RFP or a bidder's tender(s) will be disclosed by any bidder or other person not officially involved with SARS' examination and evaluation of a Tender.

No part of the RFP may be distributed, reproduced, stored or transmitted, in any form or by any means, electronic, photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a tender. This RFP and any other documents supplied by SARS remain proprietary to SARS and must be promptly returned to SARS upon request together with all copies, electronic versions, excerpts or summaries thereof or work derived therefrom.

Throughout this RFP process and thereafter, Bidders must secure SARS's written approval prior to the release of any information that pertains to (i) the potential work or activities to which this RFP relates; or (ii) the process which follows this RFP. Failure to adhere to this requirement may result in disqualification from the RFP process and civil action.

After the Closing Date, no confidential information relating to the process of evaluating or adjudicating tenders or appointing a bidder will be disclosed to a Bidder or any other person not officially involved with such process.

The award of the RFP will be conditional upon the successful bidder signing the SARS oath/affirmation of secrecy document during the contracting phase.

### **5.23 INTELLECTUAL PROPERTY**

SARS retains ownership of all Intellectual Property Rights in the tender information documents that form part of this RFP. Bidders will retain the Intellectual Property Rights in their tender responses, but grant SARS the right to make copies of, alter, modify or adapt their responses, or to do anything which in its sole discretion is necessary to do for reasons relating to the RFP process.

### **5.24 LIMITATION OF LIABILITY**

A Bidder participates in this RFP process entirely at its own risk and cost. SARS shall not be liable to compensate a bidder on any grounds whatsoever for any costs incurred or any damages suffered as a result of the Bidder's participation in this RFP process.

### **5.25 TAX COMPLIANCE**

No tender shall be awarded to a bidder who is not tax compliant. SARS reserves the right to withdraw an award made, or cancel a contract concluded with a successful Bidder in the

event that it is established that such bidder was in fact not tax compliant at the time of the award. SARS further reserves the right to cancel a contract with a successful bidder in the event that such Bidder does not remain tax compliant for the full term of the contract.

No tender shall be awarded to a bidder (or any of its members, directors, partners or trustees) whose names appear on the Register of Tender Defaulters kept by National Treasury, or who have been placed on National Treasury's List of Restricted Suppliers. SARS reserves the right to withdraw an award, or cancel a contract concluded with a Bidder should it be established, at any time, that a Bidder has been blacklisted with National Treasury by another government institution.

#### **5.26 SCREENING AND VETTING OF SERVICE PROVIDER**

Acceptance of this tender/quotation is subject to the condition that both the contracting firm and its personnel providing the service must be screened and cleared by the appropriate authorities to the grade of clearance in line to classified information, intelligence in the possession of SARS and areas designated as National Key points that they may have. Obtaining a positive recommendation is the responsibility of the contracting firm concerned. If the principal contractor appoints a subcontractor, the same provisions and measures will apply to the subcontractor.

#### **5.27 GOVERNING LAW**

South African law governs this RFP and the RFP response process. The Bidder agrees to submit to the exclusive jurisdiction of the South African courts in any dispute of any kind that may arise out of or in connection with the subject matter of this RFP, the RFP itself and all processes associated with the RFP.

### **6 INSTRUCTIONS FOR SUBMITTING A RESPONSE TO THIS RFP**

This paragraph details the instructions to bidders for preparing a tender response to **RFP05/2022**. These instructions must be followed in detail to ensure that the information contained in the bidder's tender is correct, complete and well structured. All tenders must comply with the requirements and instructions as set out in the RFP. Bidders must ensure that information and documentation supplied can be easily understood and thus, evaluated in a fair and consistent manner.

Should a tender be received that is not in the correct format, SARS reserves the right to reject the entire tender or portions of the tender depending on the extent of the deviation from the format described in this document. Information that has not been requested must not be submitted in the Bidder's tender.

## 6.1 Organisation of a Tender response

- 6.1.1** All proposals and supporting documentation must be submitted in English.
- 6.1.2** The bidder's proposal is required to be submitted as one (1) original hardcopy file clearly marked as "Original", and one (1) duplicate file clearly marked as "Copy", as well as one (1) electronic copy (a memory/USB stick) of the original hardcopy file.
- 6.1.3** Each hardcopy file and electronic copy must be marked and labelled correctly, and must be outer sealed, wrapped and packaged, for ease of reference during the evaluation process.
- 6.1.4** Pricing information must be included in a separate file (File 2), and not be included in the technical file (File 1).

**6.1.5** Irrespective of whether the bidder is responding to portions of the tender, or the tender as a whole, the Bidder will be required to submit the following:

<b>FILE 1</b>	<p><b>Section 1</b></p> <ul style="list-style-type: none"> <li>Pre-qualification documents (SBD documents)</li> </ul> <p><b>Section 2</b></p> <p>Mandatory evaluation responses and supporting documents and</p> <p><b>Section 3</b></p> <p>Technical evaluation responses and supporting documents</p> <p><b>Section 3</b></p> <ul style="list-style-type: none"> <li>Supplementary information</li> </ul> <p><b>Section 4</b></p> <ul style="list-style-type: none"> <li>Draft SLA</li> </ul>
<b>FILE 2</b>	<p><b>Section 1</b></p> <ul style="list-style-type: none"> <li>Pricing</li> </ul> <p><b>Section 2</b></p> <ul style="list-style-type: none"> <li>BEE Certificate/ Sworn Affidavit and</li> <li>SBD 6.1 – Preference Point Claim Form</li> </ul> <p><b>Section 3</b></p> <ul style="list-style-type: none"> <li>3 years most recent audited/reviewed financial statements.</li> </ul>

Please note: SARS requests that bidders use LEVER ARCH FILES to package their proposals.