RFP06/2026

APPOINTMENT OF A SERVICE PROVIDER FOR PROJECT AND PORTFOLIO MANAGEMENT INFORMATION SYSTEM FOR A PERIOD OF FOUR (4) YEARS.

NON-COMPULSORY BRIEFING SESSION

2026 JULY 15

SARS
South African Revenue Service

Contents

SARS
South African Revenue Service

01

Welcome and Introduction

South African Revenue Service

WELCOME AND INTRODUCTION

<u>**Non-Compulsory Briefing Session**</u>

Purpose

- Explain selected concepts, procedures and other aspects of the RFP

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

Important to note

- The RFP pack remains the primary source of information for the Bidder to respond.
- The briefing session is non- compulsory (non-attendance will not result in disqualification)
- The briefing session slides will be uploaded to SARS & NT Portals.

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Governance Rules and Procedures

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

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RFP Timelines

RFP TIMELINES

ACTIVITY	DATE DUE
Advertisement of Bid in the SARS Website and e-Tender	03 July 2026
Non-Compulsory briefing session	15 July 2026 at 14h00
Last day for Bidders to submit written questions	24 July 2026 at 14h00
Last day for SARS response to Bidder's written questions	29 July 2026
Bid Closing Date	**07 August 2026 at 11h00**

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Background and Requirements

BACKGROUND & REQUIREMENTS:PPMIS

SARS Enterprise Programme Management Office (EPMO) executes **numerous projects concurrently**, some projects are **critical and urgent**, while others are **long-term and may span over multiple financial years**.

Continual management from project **inception to close-out** is necessary for the success of the projects, hence the need to **connect multiple programme and project strategies, schedules, business cases, budgets, scope definitions and priorities or objectives to achieve an integrated project portfolio.**

To enable the EPMO to do so, a robust, end-to-end enterprise Project Portfolio Management and Information System (PPMIS) is required.

OBJECTIVES: PPMIS

- **Working Software** - already developed software solution with robust, end-to-end project and portfolio management capabilities as per the requirements.

- **Professional Services** – solution configuration and customization, data migration, integration, project management and change management support, post implementation support, documentation and knowledge transfer, ongoing support.

- **Training –** 5 x Administrators, ~110 end-users (contributors), read only users (social users)

FUNCTIONAL REQUIREMENTS: PPMIS

Project Demand Management

Enabling the capture, evaluation, prioritisation, approval, and governance of project demand across the organisation.

The solution must support both planned and unplanned initiatives, idea management, change requests, configurable approval workflows, portfolio balancing, and the management of diverse project types within a single integrated platform.

The capability should provide end-to-end visibility and control over the project pipeline to support effective portfolio decision-making and resource optimisation.

FUNCTIONAL REQUIREMENTS: PPMIS

Portfolio Management

Demonstrate that the proposed PPMIS can support end-to-end portfolio management - by maintaining initiative records, configuring portfolios and hierarchies, enabling scenario planning, dashboards, baselines, approvals, multi-year views, enterprise scheduling, and full resource capacity, allocation, forecasting and timesheet management.

Views at a detailed stream level, with the capability to roll up to the project/programme or portfolio level (in terms of people allocation, finances, status, etc)

FUNCTIONAL REQUIREMENTS: PPMIS

Programme and Project Management

Demonstrate that the PPMIS can manage projects and programmes end-to-end, including stakeholders, resources, schedules, benefits, risks, dependencies, changes, governance, document management, workflows, dashboards, reporting, calendars, templates, search, and deliverables.

MS Project Integration, GANTT and PERT Charts.

Support Agile, Hybrid and Waterfall Methodologies

BACKGROUND & REQUIREMENTS: PPMIS

Financial Management

Portfolio financial planning (eg utilise ENE, MTEF, and other information).

Forecasting at project, portfolio and programme levels (including cost, time and scope estimate management).

Project cost management across project, programme and portfolio levels, including budgets, actuals, variances, thresholds, ageing, and other financial oversight constructs.

Financial what if scenario planning, dashboards, financial health indicators, earned value indicators, and related aligned with the broader reporting capability expectations.

FUNCTIONAL REQUIREMENTS: PPMIS

Management Reporting

Demonstrate that the PPMIS provides enterprise-level reporting, including configurable metrics, Power BI integration, standard and dynamic reports, historical and real-time data, exception alerts, scheduled/on-demand reporting, complex calculations, and multi-format report publication.

BACKGROUND & REQUIREMENTS: PPMIS

Security and User Management

Permission management, role-based and multi-group user profiling.

Digital rights management.

User authorisations (view, modify, create, or delete information).

Authentication and audit trails: comprehensive logging and monitoring of all access and modifications made to records.

Integration with Microsoft Active Directory (AD): single sign-on.

Ability for EPMO to administer security and access down to specific fields.

FUNCTIONAL REQUIREMENTS: PPMIS

Technical Requirements

The technical requirements consist of a secure, **cloud based**, PPMIS with South African data residency that delivers scalable and high-performance architecture, legislative and governance compliance, strong integration and configurability, real-time and offline data access, local support, and mobile capability to support enterprise-wide project, portfolio and programme management.

FUNCTIONAL REQUIREMENTS: PPMIS

The ability to scale the solution with SARS' future requirements in mind must be provided, including support for a growing user base, expanded scope and increased transaction volumes.

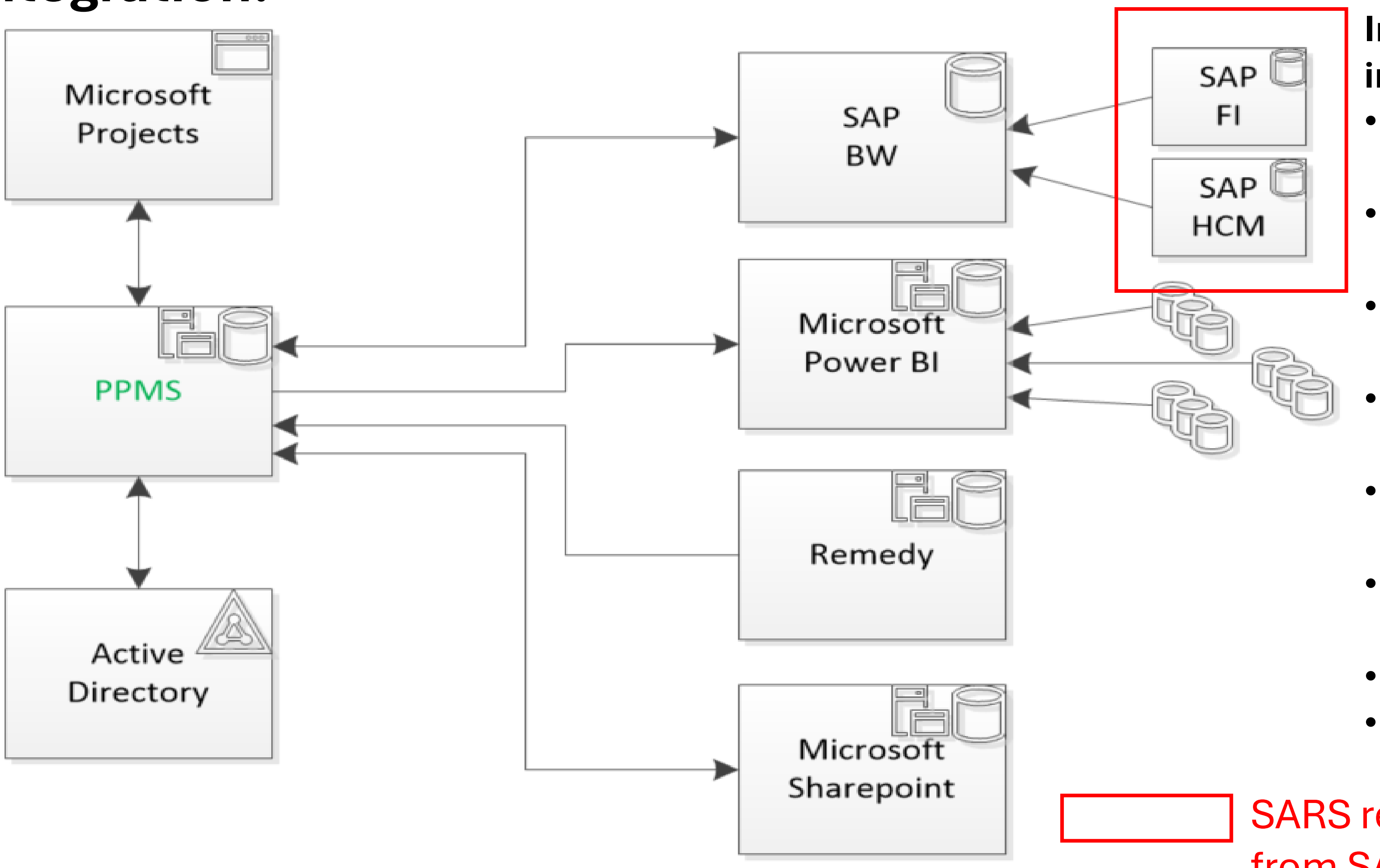
An architecture that supports evolving user interface requirements, integration and interoperability, including web access via standard browsers and mobile interfaces, with compatibility for Microsoft Edge.

Configuration capability.

Real-time or near real-time data updates.

FUNCTIONAL REQUIREMENTS: PPMIS

Integration:



Integration points with other systems include:

- Microsoft Projects (Project Scheduling)
- Microsoft SharePoint (Document Repository)
- Microsoft Power BI (Reporting Services)
- Active Directory (User access control)
- SAP Business Warehouse (Financial Reporting)
- SAP Human Resources (Resource Management)
- SAP Finance (Project Financials)
- Remedy (incident management)

SARS retained responsibility to integrate from SAP FI and SAP HCM to SAP BW.

FUNCTIONAL REQUIREMENTS: PPMIS

Integration:

Pre-developed APIs must be provided, and the ability to create additional integrations and APIs must be supported.

Compatibility with SARS' requirements such as user devices, approved software and mobile devices.

Offline access capability so that users can access the system when connectivity is limited or unavailable

NON-FUNCTIONAL REQUIREMENTS: PPMIS

Training and Knowledge Transfer

Tailored Training Programme: Multiple formats for contributors and administrators

Provide a training sustainability plan for future years (such as recorded sessions and knowledge reviews etc).

NON-FUNCTIONAL REQUIREMENTS: PPMIS

Transition, acceptance and effective use

A testing and quality assurance plan.

Description of support services during SARS business and extended hours.
The proposed Service Level Agreements.

South African on-site support (local support) capability of 1 x senior consultant (4 hour turnaround time). The senior consultant should have a minimum of 3 years experience supporting the solution.

NON-FUNCTIONAL REQUIREMENTS: PPMIS

Transition, acceptance and effective use

Off-site support as required.

Explanation of how routine software updates and patches are managed to fix bugs and security weaknesses.

Single point of contact account manager.

NON-FUNCTIONAL & REQUIREMENTS: PPMIS

SARS Retained Task: To prepare SARS for the change and ongoing operations

Implementation Approach: Methodology, project team composition (EPMO and Contractor) end-to-end project schedule

Additional information and features: Details of additional features not explicitly specified that enhance the value of the proposed solution **eg AI**

NON-FUNCTIONAL REQUIREMENTS: PPMIS

Licencing Packages

Enterprise wide “Read access” through a web page (hyperlink) – 50 users

Year 1

110 users with Read/Write

5 users with Administrator access

Year 2

122 users with Read/Write

5 users with Administrator access

Year 3

134 users with Read/Write

5 users with Administrator access

Year 4

148 users with Read/Write

5 users with Administrator access

BACKGROUND & REQUIREMENTS: PPMIS

Implementation Hardware and Software Requirements

A detailed breakdown for at least one of the proposed deployment options.

- **Cloud-based deployment**: (South African data residency)

A complete, detailed subscription costing model including licensing, hosting, implementation, maintenance and support fees. Costs should be presented on a recurring (monthly/annual) basis.

- **On-Premises Deployment**

Written confirmation that the solution (in terms of the application, database and integration requirements) complies with SARS current infrastructure as provided below, and that the software can be hosted and run on such.

BACKGROUND & REQUIREMENTS: PPMIS

Platform Requirements

Application: Microsoft Windows Server version 2019 and beyond
Database – SQL Server 2022

Application Integration Requirements

- The solution must comply to the following:
- XML Extensible Mark-up Language
- Protocol (SOAP) / Simple Query Language (SQL)
- Enterprise Service Bus (ESB) WebSphere and BizTalk
- Web Services Definition Language
- (WSDL) / Java Beans / MQ WebSphere
- File Transfer Protocol (FTP) batch interfaces via IBM MQFTE).

05

Bid Evaluation Process

BID EVALUATION PROCESS

GATE 0 - PREQUALIFICATION

Invitation to Bid – SBD 1	Declaration of Interest (SBD 4)	Preference Point Claim Form – SBD 6.1
Central Supplier Database Report	General Conditions Contract	Annual Financial Statements

BID EVALUATION PROCESS

GATE 1

MANDATORY EVALUATIONS

Bidders are required to refer to Section 8.3 (page 12) of the Main RFP document for the mandatory requirements.

Microsoft Word
Document

BID EVALUATION PROCESS – GATE 2 TECHNICAL EVALUATION

TOTAL POINTS – 100

THRESHOLD

PPMIS- 66.67 POINTS

Bidders are required to refer to Section 8.5 (page 13) of the Main RFP document for the Technical requirements

06

Price & Specific goals

BID EVALUATION PROCESS – GATE 3

Refer to section 8.6 (Page 93) of the RFP Main doc

PRICE = 80 + SPECIFIC GOALS = 20 = TOTAL 100

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

BID EVALUATION PROCESS
GATE 3, STAGE 1

Price Evaluation = 80 Points

- Points for the price evaluation will be calculated in accordance with the formula stated below.

Price evaluation formula	Points
$Ps = 80\left(1 - \frac{Pt - P\min}{P\min}\right)$	80

- Bidders are required to complete all line items in the pricing response template provided in line the proposed deployment model.
- Maximum points to be awarded = 80

BID EVALUATION PROCESS
GATE 3, STAGE 2

Specific goals = 20 Points

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

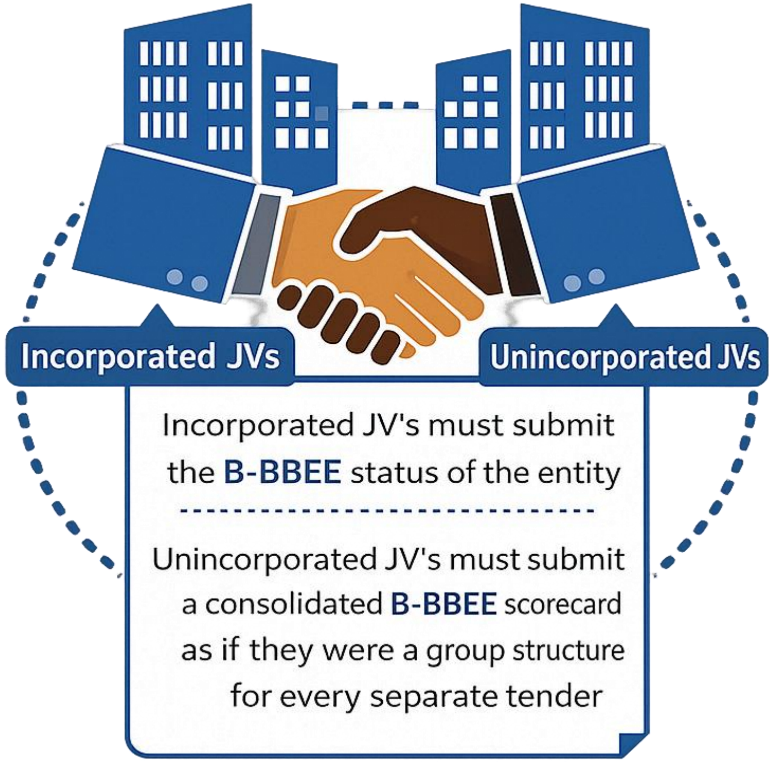
- Bidders MUST complete and sign the SBD 6.1 form to and provide prescribed supporting evidence to claim the points for Specific goals, failing which, the Bidder will be scored zero.
- Maximum points to be awarded = 20

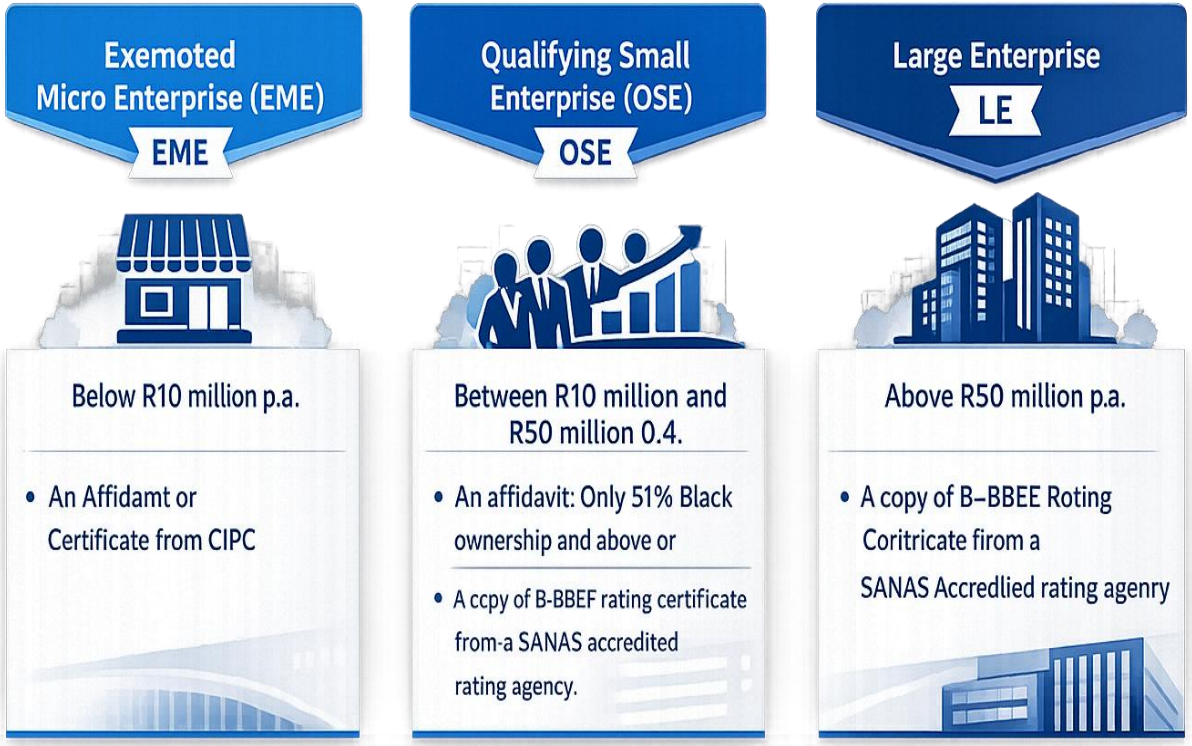
SPECIFIC GOALS ALLOCATED POINTS IN TERMS OF THIS TENDER

SPECIFIC GOALS	NUMBER OF POINTS ALLOCATED (80/20 SYSTEM)
An EME (Exempted Micro Enterprise) / QSE (Qualifying Small Enterprise) with at least 51% Black	5
An entity with at least 30% Black Women Ownership.	5
An entity with at least 51% Black Youth Ownership	5
An entity that is an EME (Exempted Micro Enterprise) or QSE (Qualifying Small Enterprise) owned by person with disability	5

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".*

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Financial Analysis

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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.

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Services Agreements

SERVICE AGREEMENTS

General Conditions of Contract

- Bidders must initial and sign the SARS General Conditions of Contract (GCCs) and submit as part of their submissions. These terms are non-negotiable and must remain unaltered.

- Bidders must further provide any Product, License, End User License Agreement, or any other agreement applicable to the Bidders proposed solution / tool.

- SARS shall upon review of the proposed solution / tool and if deemed necessary at its sole discretion conclude any further agreement that might be required with the bidder upon award.

- And such agreement shall be concluded within a period of 21 days after award.

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Tender Award

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TENDER AWARD

The contract will be awarded to the bidder attaining the highest overall score based on the consolidated points allocated for price and B-BBEE/specific goals, subject to any objective criteria and the bidder meeting all applicable tender and contractual conditions.

Objective Criteria

- “SARS reserves the right to award either the cloud-based or on-premises deployment option based on the solution that provides the optimum balance of risk, sustainability and total cost of ownership over the contract term”

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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 **07 August 2026 at 11:00 am**

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.

The tender must be submitted to

TENDER BOX

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

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

RFP SUBMISSION FILES FORMAT

All RFP Submission files <u>MUST</u> 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

RFP SUBMISSION AND CONTACT DETAILS

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

Email format:

Subject	***: "RFP 06-2026 – Question"***
Body	***: "Supplier : <supplier name>"***
	: "Question : <Question text>"

INSTRUCTIONS FOR SUBMITTING A RESPONSE TO THIS RFP – TECHNICAL PROPOSAL

Common File		
Label (on both file cover and USB)		**RFP 06/2026** **APPOINTMENT OF A SERVICE PROVIDER FOR PROJECT AND PORTFOLIO MANAGEMENT INFORMATION SYSTEM** **<Bidder Name>** **Folder 1**
No.	**File divider/Directory name**	**Content required**
1	SBDs	Completed SBDs. *Invitation to Bid (SBD1)* *Declaration of Interest (SBD 4)* *Supplier Cost and Risk Assessment Questionnaire* The original signed documents must be included in the hardcopy file. In the electronic copy, the original signed document must be scanned and submitted in PDF format.

INSTRUCTIONS FOR SUBMITTING A RESPONSE TO THIS RFP – TECHNICAL PROPOSAL

2	Bidder CSD Registration Report	CSD registration report, including the Tax Clearance Status. In the hardcopy file, a printout of the report obtained from the CSD system should be included. (www.csd.gov.za). In the electronic copy the downloaded PDF report should be included.
3	Mandatory Response Template	A completed template : *Mandatory Response Template* A printout of the completed and signed template(s) must be included in the hardcopy file. The completed template(s) must be submitted in Microsoft Word format in the electronic copy.
4	Technical Response	Technical Response
5	Checklist	Completed template: *Proposal Checklist* A signed printout of the completed template must be included in the hardcopy file. A scanned copy of the signed checklist must be submitted in PDF format.

INSTRUCTIONS FOR SUBMITTING A RESPONSE TO THIS RFP - PRICING AND SPECIFIC GOALS SECTION

(Pricing B-BBEE/ specific goals proposal Section)		
Label (on both file cover and USB)		**RFP 06/2026** **APPOINTMENT OF A SERVICE PROVIDER FOR PROJECT AND PORTFOLIO MANAGEMENT INFORMATION SYSTEM** **<Bidder Name>**
No.	**File divider/Directory name**	**Content required**
1	Pricing Response Template	Completed template: Pricing *Response Template* A printout of the completed template must be included in the hardcopy file. The completed template must be submitted in Microsoft Excel format in the electronic copy.
2	Preference Points Claim Form	A completed Preference Points Claim Form (SBD 6.1)
3	Bidder’s B-BBEE Credentials	The bidder’s B-BBEE certificate or sworn affidavit, valid as at the closing date. For the electronic copy, the original hardcopy must be scanned and submitted in PDF format.
4	Annual Financial Statements	The bidder’s last three (3) years audited annual financial statements. In the electronic copy the originals must be scanned and submitted in PDF format.

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Question & Answers

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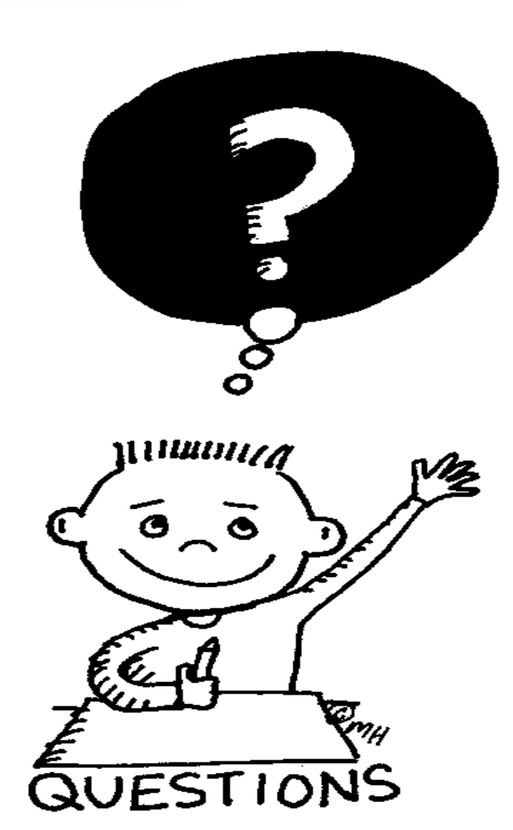
QUESTION AND ANSWERS



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Thank you

Siyabulela

Siyabonga

Siyathokoza

Dankie

Re a leboga

Re a leboha

Ro livhuwa

Ha khensa

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