

APPOINTMENT OF A SERVICE PROVIDER TO CONDUCT A PUBLIC OPINION SURVEY ON TAX COMPLIANCE AND TO DEVELOP THE ATTITUDE TO TAX COMPLIANCE INDEX

NON- COMPULSORY VIRTUAL BRIEFING SESSION: 7 OCTOBER 2025 AT 11:00AM

RFP NO.: RFP 27/2025

CLOSING DATE: 28 OCTOBER 2025 11:00 AM



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2. Governance, Rules and Procedures
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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.



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Procedures during Briefing Session

- **The session is being recorded**
- **Questions during the session.**
 - SARS will take questions during the session, and respond to that in writing
 - ✓ 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
 - SARS will review and focus on most pertinent themes arising from the questions and provide answers where possible



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Communication Requirements

- **Strict communication channels to be adhered to (refer to RFP document)**
 - 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: • Issuing of the RFP documents SARS	26 September 2025
Non - Compulsory virtual briefing session	7 October 2025 AT 11:00
Last date for questions relating to RFP	10 October 2025
Bid Closing Date	28 October 2025 AT 11:00
Notice to bidders	December 2025 /January 2026



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BACKGROUND & SCOPE OF WORK

Refer to section 2 for the Background and overview of SARS' requirements (scope of work and requirements) for the Appointment of a service provider for Research Services to conduct the Public Opinion Survey and the development of the Attitude to Tax Compliance Index



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BID EVALUATION PROCESS

Refer to section 8 of the RFP doc

Gate 0

Pre-Qualification

- Invitation to Bid (SBD 1)
- Central Registration Report (Central Database System) from NT
- Standard Bidding Document (SBD 4)
- Preference Point Claim Form (SBD 6.1)
- Supplier Risk Questionnaire
- A complete set of three (3) most recent years annual financial statements



Solidarity

Equality

Sustainability



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BID EVALUATION PROCESS

Refer to section 7 of the RFP doc

Gate 2

Technical
Evaluation

100
points

Achieve overall score of 70 out
of 100 points to proceed to the
next gate

- 7.3 Technical Requirements
- Evaluations will be conducted in two-fold. I.e. Desktop 40 points & presentation 60 points

Gate 3

Price = 80

100
points

BBBEE = 20

- B-BBEE Certificate/ Sworn Affidavit
- Preference Point Claim Form (SBD 6.1)
- Annexure B – Pricing Template



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Bid Evaluation Process Gate 3 – Price

The Price and B-BBEE 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
Specific Goals	20

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



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B-BBEE evaluation (Gate 3, Stage 2) Refer to section 7.4.4 of the RFP doc

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

#	Criteria	Points
1	Specific goals	20



SPECIFIC GOALS

Points for the specific goals evaluation will be allocated in accordance with a bidder's B-BBEE compliance as per SBD 6.1.

The specific goals allocated points in terms of this tender as per SBD6.1	Number of points allocated (20)
The abovementioned points are broken down as per below	
Exempted Micro Enterprise (EME)/Qualifying Small Enterprise (QSE)	2
An entity with at least 51% Black Ownership	5
The entity has at least 30% Black Women Ownership	5
The entity has at least 51% Black Youth Ownership	4
The entity that is at least 51% Black owned by Persons with Disabilities.	4



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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
- SARS reserves the right to request bidders to submit proof of any information, to substantiate claims made about their Specific goals



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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 bidder.
- 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

Solidarity

Equality

Sustainability



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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.

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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Service Level Agreement

Bidders are requested to:

Comment on the terms and conditions set out in the Service Level 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 Service Level 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.



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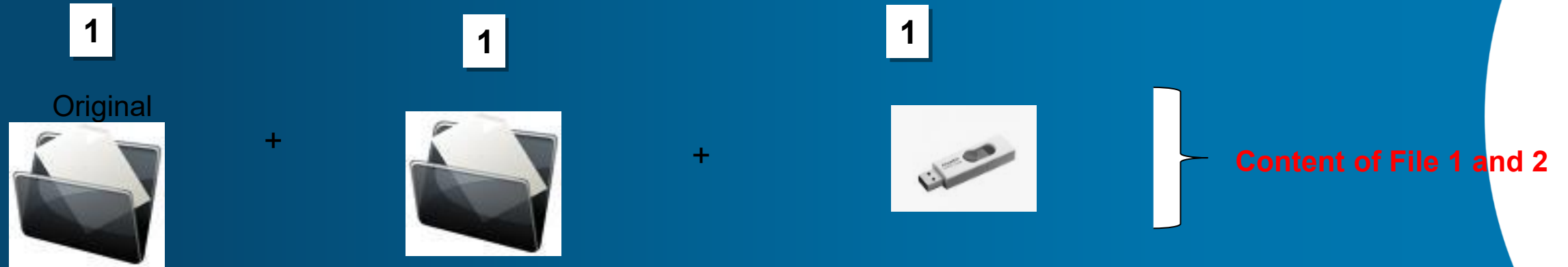
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BID SUBMISSION

- Bidders must submit copies of each file (Original and Duplicate) and a USB with content of each file by the **28 October 2025 at 11:00**
- Bid documents will only be considered if received by SARS by the **28 October 2025 at 11:00**, regardless of the method used to send or deliver such documents to SARS.



TENDER BOX

Email submission

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



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FILE 1: ORIGINAL / DUPLICATE

Exhibit 1

Pre-qualification documents

- SBD documents and other documents

Exhibit 2

Technical Response

- Response to technical requirements
- Supporting documents for technical requirements



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FILE 2: ORIGINAL / DUPLICATE

Exhibit 1

Pricing

- Annexure C : Pricing Schedule

Exhibit 2

B-BBEE

- B-BBEE Certificate/ Sworn Affidavit
- SBD 6.1

Exhibit 3

Annual Financial Statements

- 3 most recent years audited/ independently reviewed financial statements

NB ! Each file must be marked correctly and sealed separately for easy reference during the evaluation process. USB must be marked with Bidder Name



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



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Equality

Sustainability



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