

REFERENCE: RFP 45/2015

REQUEST FOR PROPOSAL

DESCRIPTION:

**APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR
MARKETING, ADVERTISING AND RELATED SERVICES**

DATE ISSUED: 29 FEBRUARY 2016

CLOSING DATE: 07 APRIL 2016, 11H00

TENDER BOX:

GROUND FLOOR, LINTON HOUSE

BROOKLYN BRIDGE

570 FEHRSEN STREET

BROOKLYN, PRETORIA

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1 INTRODUCTION

The South African Revenue Service (SARS) is uniquely placed to contribute to government's plan of action to address socio-economic growth and development, poverty alleviation and job creation. Through the vital role of providing the revenue to fund the full spectrum of initiatives, plans, programmes and strategies of national and provincial government departments, SARS plays a crucial enabling role in government delivery.

1.1 OVERVIEW OF SARS

Our Mandate

In terms of the South African Revenue Service Act, 1997 (No. 34 of 1997), SARS is mandated to:

- Collect all revenues due;
- Ensure maximum compliance with tax and customs legislation; and
- Provide a customs service that will maximise revenue collection, protect our borders and facilitate trade.

Our Vision

SARS is an innovative revenue and customs agency that enhances economic growth and social development, and that supports the country's integration into the global economy in a way that benefits all South Africans.

Our Mission

To optimise revenue yield, to facilitate trade and to enlist new tax contributors by promoting awareness of the obligation to comply with tax and customs laws, and to provide a quality, responsive service to the public.

Our Values

F – Fairness

A – Accountability

I – Integrity

R – Respect

Our Core Outcomes

- Increased Customs Compliance
- Increased Tax Compliance
- Increased ease and fairness of doing business with SARS
- Increased cost effectiveness, internal efficiency and institutional respectability.

2 PURPOSE OF THIS REQUEST FOR PROPOSAL (RFP)

The purpose of this Request for Proposal (RFP) is to appoint a panel of service providers for marketing, advertising and related services. The marketing, advertising and related services constitute the following categories:

Category A: Marketing and Advertising;

Category B: Events Management; and

Category C: Marketing and Advertising related Research.

Bidders may submit proposals in respect of any one (1) or a combination of the three (3) service categories.

This bid 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.

3 LEGISLATIVE FRAMEWORK OF THE BID

3.1 TAX LEGISLATION

Bidders should be familiar with all tax laws applicable in the Republic of South Africa and should fully comply with such laws.

3.2 PROCUREMENT LEGISLATION

SARS has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act No. 1 of 1999), the Preferential Procurement Policy Framework Act, 2000 (Act No.5 of 2000) and the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003).

3.3 TECHNICAL LEGISLATION AND/OR STANDARDS

Bidder(s) should be cognisant of all legislation and/or standards specifically applicable to the services.

4 BRIEFING SESSION

A non-compulsory briefing session will be held at Linton House, Brooklyn Bridge, 570 Fehrsen Street, Brooklyn, Pretoria, on **14 March 2016 at 11h00**, to clarify the scope and extent of work to be executed.

5 DURATION OF CONTRACT

The successful bidders will be appointed to a panel for the initial period of 36 months. SARS reserves the right, to be exercised at SARS' sole discretion, to extend the duration of the appointment of the panel by 12 additional months.

6 APPOINTMENT TERMS

SARS does not guarantee that successful bidders will receive work during their appointment term. Subject to a competitive process for a Service Request, successful bidders will be utilised on an ad hoc basis, as and when required by SARS.

7 TIMELINE OF THE BID PROCESS

The validity period for the tender and withdrawal of offers, after the Closing Date and time, is 180 days.

The project timeframes of this Bid are set out below:

Activity	Date Due
Advertisement of Bid in government tender bulletin	12 February 2016
Advertisement of Erratum in government tender bulletin	04 March 2016
Advertisement on Sunday Times	06 March 2016
Distribution of Bid documents on the SARS website	29 February 2016
Non-compulsory briefing session	14 March 2016
Questions relating to RFP from Bidder(s)	22 March 2016
Bid Closing Date	07 April 2016 at 11H00
Notice to Bidder(s).	June/ July 2016

All times given in this bid are South African Standard Time.

Any time or date in this bid is subject to change at SARS's discretion. A reference to a time or date in this bid 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 that specific date or at that specific time. The Bidder accepts that, if SARS extends the deadline for bid submission (the closing date) for any reason, the requirements of this Bid will otherwise apply equally to the extended deadline.

8 CONTACT

A nominated official of the Bidder(s) can make enquiries in writing, to the specified person, Mr Aser Makgate (Procurement Tender Office) via email tenderoffice@sars.gov.za and copy rfp-professionalservices@sars.gov.za. Bidders must reduce all telephonic enquiries to writing and send the same to the above email addresses.

9 SARS SCOPE OF SERVICE

BACKGROUND

SARS Communication Division will, on an on-going basis, partner with service providers on the panel to conceptualise, develop and implement comprehensive through-the-line marketing and communication strategies in support of the overall strategic objectives of SARS encompassing all products, divisions, programmes and campaigns including brand building, positioning and advertising thereof.

SARS Communication Division may from time to time utilise the services of the aforesaid panellists to provide marketing, advertising and related services, which have been stratified to include:

CATEGORY A - Marketing and Advertising;

CATEGORY B - Events Management; and

CATEGORY C - Marketing and Advertising related Research.

SCOPE OF SERVICES

Bidders may submit proposals in respect of the following Categories:

9.1 **CATEGORY A:** Marketing and Advertising

The Marketing and Advertising specification includes, but is not limited to:

- 9.1.1 Developing, refining and helping to implement the overall marketing and communication strategy for SARS;
- 9.1.2 Developing and implementing various marketing and communication campaigns;
- 9.1.3 Developing and producing creative advertising / marketing products;
- 9.1.4 Working in partnership with the SARS media placement partner to develop and implement through-the-line marketing strategies;
- 9.1.5 Identifying areas of improvement / innovation in communication and marketing for SARS and advising on a suitable course of action;
- 9.1.6 Conceptualising, producing and sustaining effective through-the-line advertising in respect of all strategy development, creative production, account handling and account planning for marketing activities and campaigns of SARS;
- 9.1.7 Ensuring effective liaison for planning and implementation purposes with SARS, the media partners and other service providers;
- 9.1.8 Providing graphic design services, including animation to online use or presentations, and the development of material in Flash;
- 9.1.9 Providing special services including social marketing, social media, and specific technical presentations when required; and
- 9.1.10 Providing audio-visual services such as videos, online videos, videography. Services will also include editing of material of content, script writing, pre-production, production and post-production.

9.2 CATEGORY B: Events Management

The Events Management specification includes but is not limited to:

- 9.2.1 Creative conceptualisation for major SARS events;
- 9.2.2 Co-ordination and management of major events with SARS;
- 9.2.3 Logistical services associated with the implementation of events:
 - 9.2.3.1 Providing amongst others, concepts / ideas for speakers, presenters, entertainers and/or programme directors;
 - 9.2.3.2 Venue selection and booking when required by SARS;
 - 9.2.3.3 Facilitation of the inviting of attendees / RSVP;
 - 9.2.3.4 Registration of guests electronically at events;
 - 9.2.3.5 Provision of audio-visual equipment such as speakers, screens and visual aids when required;
 - 9.2.3.6 Branding of events;
 - 9.2.3.7 Development of an event theme when required;
 - 9.2.3.8 Development, design and/or production of promotional material / collateral (conceptualising and production of marketing collateral such as leaflets, audio-visual, scripts for speakers);
 - 9.2.3.9 Development of a sequence of events / scripts for events; and
 - 9.2.3.10 Development of the event décor, including stage and table décor setting;
- 9.2.4 Event risk management:
 - 9.2.4.1 Development of a risk management plan (including crowd management, emergency procedures and a medical plan);
 - 9.2.4.2 All staff of successful bidders working on SARS events must go through criminal checks and sign an oath of secrecy; and
 - 9.2.4.3 Plans to ensure that the relevant event is compliant with all legal and municipal requirements i.e. The successful Bidder will be required to obtain the relevant permits and/or licenses in order to comply with municipal by-laws when hosting a SARS event; and
- 9.2.5 Catering services for major events, as and when required.

9.3 CATEGORY C: Marketing and Advertising related Research

The Marketing and Advertising related Research specification includes, but is not limited to:

- 9.3.1 Qualitative and quantitative research;
- 9.3.2 Brand or campaign surveys;
- 9.3.3 Marketing data and analytics;
- 9.3.4 Analysis and interpretation of research findings;
- 9.3.5 Data insights; and
- 9.3.6 Proposed strategy.

Bidders may submit proposals in respect of any one (1) or a combination of the three (3) service categories.

9.4 KEY MARKETING AND COMMUNICATION PROJECTS FOR SARS

Key annual communication and marketing campaigns include, but are not necessarily limited to the following:

9.4.1 **Category A and C:** Marketing and Advertising, and Marketing and Advertising related Research

- 9.4.1.1 Employer Interim Reconciliation (September to October) and Annual Reconciliation (April to May);
- 9.4.1.2 Income Tax Season (July to January);
- 9.4.1.3 Campaigns for business and individual tax (On-going);
- 9.4.1.4 Campaigns for Customs (On-going);
- 9.4.1.5 Revenue campaign (November to March); and
- 9.4.1.6 Ad hoc.

9.4.2 **Category B:** Events Management

- 9.4.2.1 Employee recognition awards;
- 9.4.2.2 Branch openings; and
- 9.4.2.3 Ad hoc events.

9.5 **DOCUMENTATION REQUIRED**

Bidders are required to submit all the required information for each category they are tendering for. Each category will be evaluated independent of each other and it is therefore important that Bidders respond submit all the required information separately should they be submitting proposals in one (1) or any combination of the three (3) categories.

Bidders must refer to the following Annexures in their response to the documentation required for each category:

- ANNEXURE A1: Technical Evaluation Scorecard for CATEGORY A – Marketing and Advertising;
- ANNEXURE B1: Technical Evaluation Scorecard for CATEGORY B – Events Management; and
- ANNEXURE C1: Technical Evaluation Scorecard for CATEGORY C – Marketing and Advertising related Research

9.6 **SARS REQUIREMENTS FROM THE BIDDER(S) FOR CATEGORY A**

Bidders are required to submit their response to all the information in this section.

9.6.1 **Company Profile and Resources**

Provide

- 9.6.1.1 A company profile, organisational structure and infrastructure to render the services;
- 9.6.1.2 Indicate a range of in-house services provided specific to creative advertising;
- 9.6.1.3 Staff compliment;
- 9.6.1.4 Level of expertise of key personnel that may be recommended to SARS, their accessibility, qualifications and competencies relevant to the scope of services; and
- 9.6.1.5 Full contact details of the key contact person / Accounts Manager.

9.6.2 Capability

9.6.2.1 Provide a schedule of the bidder's experience and proven track record over the past four (4) years. The information provided for each client (a minimum of 3) must include:

- Client name;
- Contact person, phone number, company business address;
- Contract period;
- Description of a project / campaign;
- Value of the project;
- Challenges; and
- Value-added services.

Please note that SARS will sample and reserves the right to contact the clients for a reference check. It is important to ensure that the clients listed on the bidder's schedule are contactable.

9.6.2.2 Provide the number of accounts retained and lost over the past four (4) years.

9.6.2.3 Provide (in not more than 1500 words):

One (1) recent case study including,

- Approach / methodology used to execute project;
- Demonstrate skills and experience of resources; and
- Return on Investment that the bidder secured for the client.

9.6.3 SARS Brand

Demonstrate (in not more than 500 words):

- An understanding of the SARS brand and its mandate; and
- An understanding of challenges facing the SARS brand and how these could be addressed.

9.6.4 Skills and Knowledge Transfer

Demonstrate:

- The Bidder's approach to ensure skills and knowledge transfer to SARS's staff.

9.6.5 Testimonials

Provide two (2) most recent testimonials from any clients, where similar services were provided. The testimonials must include but not be limited to:

- Brief description of services rendered;
- Quality of service;
- Performance; and
- Work within budget / Cost.

9.7 SARS REQUIREMENTS FROM BIDDER(S) FOR CATEGORY B

9.7.1 Company Profile and Resources

Provide:

- 9.7.1.1 A Company profile, organisational structure and infrastructure to render the services;
- 9.7.1.2 Indicate a range of in-house services provided specific to creative advertising;
- 9.7.1.3 Staff complement;
- 9.7.1.4 Level of expertise of key personnel that may be recommended to SARS, their accessibility, qualifications and competencies relevant to the scope of services; and
- 9.7.1.5 Full contact details of the key contact person / Accounts Manager.

9.7.2 Capability

- 9.7.2.1 Provide a schedule of the bidder's experience and proven track record over the past four (4) years. The information provided for each client (a minimum of 3) must include:

- Client name;
- Contact person, phone number, company business address;
- Contract period;
- Description of an event;
- Number of delegates;
- Where applicable, indicate VIPs (e.g. Government, Board members, Ministers);
- Value of the project;
- Challenges; and
- Value-added services.

Please note that SARS will sample and reserves the right to contact the clients for a reference check. It is important to ensure that the clients listed on the bidder's schedule are contactable.

- 9.7.2.2 Provide (in not more than 1500 words for each case study):

Two (2) most recent case studies demonstrating the bidder's experience in conceptualising and managing all aspects of corporate event management from start to end. This includes but is not limited to:

- Concept design;
- Creative direction;
- Event production;
- Creation of corporate collateral;
- Set design;
- Technical staging; and
- Logistical management.

9.7.3 Testimonials

Provide (2) most recent testimonials from a client, where similar services were provided. The testimonials must include but not limited to:

- Brief description of services rendered;
- Quality of service;
- Performance; and
- Work within budget/Cost.

9.8 SARS REQUIREMENTS FROM BIDDER(S) FOR CATEGORY C

9.8.1 Company Profile and Resources

Provide:

- 9.8.1.1 A Company profile, organisational structure and infrastructure to render the services;
- 9.8.1.2 Indicate a range of in-house services provided specific to creative advertising;
- 9.8.1.3 Staff complement;
- 9.8.1.4 Level of expertise of key personnel that may be recommended to SARS, their accessibility, qualifications and competencies relevant to the scope of services; and
- 9.8.1.5 Full contact details of the key contact person / Accounts Manager.

9.8.2 Capability

- 9.8.2.1 Provide a schedule of the bidder's experience and proven track record over the past four (4) years. The information provided for each client must include:
 - Client name;
 - Contact person, phone number, company business address;
 - Contract period;
 - Description of a project / campaign;
 - Value of the project;
 - Challenges; and
 - Value-added services.

Please note that SARS will sample and reserves the right to contact clients for a reference check. It is important to ensure that the clients listed on the bidder's schedule are contactable.

- 9.8.2.2 Provide the number of accounts retained and lost over the past four (4) years.
- 9.8.2.3 Provide (in not more than 1500 words for each case study):
 - 9.8.2.3.1 Two (2) most recent case studies demonstrating bidder's experience in marketing and advertising related research by detailing the challenges faced, solutions implemented and the benefits (ROI) derived by the respective clients.

9.8.3 Skills and Knowledge Transfer

Demonstrate:

- A Bidder's approach to ensure skills and knowledge transfer to SARS's staff.

9.8.4 Testimonials

Provide (2) most recent testimonials from any clients, where similar services were provided. The testimonials must include but not be limited to:

- Brief description of services rendered;
- Quality of service;
- Performance; and
- Work within budget/Cost.

10 INSTRUCTIONS TO BIDDER(S)

- 10.1 Bids must be properly packaged and deposited on or before the closing date and before the closing time **(07 April 2016 at 11H00)** in the tender box situated at the main entrance of the:

SARS Procurement Centre
Linton House - Ground floor
Brooklyn Bridge, 570 Fehrsen Street
Brooklyn
Pretoria

- 10.2 Bid documents may also be posted to The Tender Office - SARS Procurement Department, Linton House, Brooklyn Bridge, 570 Fehrsen Street, Brooklyn, Pretoria, 0181.
- 10.3 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.
- 10.4 Late bids will not be accepted and shall be returned to Bidder(s).
- 10.5 The Bidder(s) are required to submit two (2) copies of each file (original and duplicate) and 1 CD-ROM / USB with content of each file for *each category they are tendering for* by **07 April 2016 at 11H00**.

Each file and information in the CD-ROM / USB must be labelled and submitted in the following format:

10.5.1 FILE 1 – DOCUMENTATION REQUIRED FOR CATEGORY A – MARKETING AND ADVERTISING

Exhibit 1

- Pre-qualification documents (SBD Documents)

Exhibit 2

- Bidder's technical response to Annexure A1
- Supporting documents for technical responses

- References

Exhibit 3

- Company profile
- Supplementary information

Exhibit 4

- General Conditions of Contract (GCC)
- Draft Master Services Agreement

Exhibit 5

- B-BBEE Certificate (copy of the most recent and valid)
- Financial Statements
- Bidder's rate card

Each file and CD-ROM / USB must be marked correctly and sealed separately for easy reference during the evaluation process.

10.5.2 FILE 2 – DOCUMENTATION REQUIRED FOR CATEGORY B – EVENTS MANAGEMENT

Exhibit 1

- Pre-qualification documents (SBD Documents)

Exhibit 2

- Bidder's technical response to Annexure B1
- Supporting documents for technical responses
- References

Exhibit 3

- Company profile
- Supplementary information

Exhibit 4

- General Conditions of Contract (GCC)
- Draft Master Services Agreement

Exhibit 5

- B-BBEE Certificate (copy of the most recent and valid)
- Financial Statements
- Bidder's rate card

Each file and CD-ROM / USB must be marked correctly and sealed separately for easy reference during the evaluation process.

10.5.3 FILE 3 – DOCUMENTATION REQUIRED FOR CATEGORY C – MARKETING AND ADVERTISING RELATED RESEARCH

Exhibit 1

- Pre-qualification documents (SBD Documents)

Exhibit 2

- Bidder's technical response to Annexure C1
- Supporting documents for technical responses
- References

Exhibit 3

- Company profile
- Supplementary information

Exhibit 4

- General Conditions of Contract (GCC)
- Draft Master Services Agreement

Exhibit 5

- B-BBEE Certificate (copy of the most recent and valid)
- Financial Statements
- Bidder's rate card

Each file and CD-ROM / USB must be marked correctly and sealed separately for easy reference during the evaluation process.

10.6 AGREEMENTS

10.6.1 General Conditions of Contract

Any award made to a Bidder under this Bid is conditional, amongst others, upon:

10.6.1.1 The Bidder accepting the terms and conditions contained in the General Conditions of Contract as the minimum terms and conditions upon which SARS is prepared to enter into a contract with the successful Bidder;

10.6.1.2 Such Bidder accepting all terms and conditions applicable to the provision of Marketing, Advertising and Related Services as set out in this RFP document; and

10.6.1.3 The Bidder submitting the General Conditions of Contract to SARS together with its Bid, duly signed by an authorised representative of the Bidder.

10.6.2 Master Services Agreement

The Master Services Agreement constitutes the specialised terms and conditions upon which SARS is prepared to contractually engage the prospective Bidder(s) to render the services under this bid. Bidders are requested to:

10.6.2.1 Indicate their acceptance of the terms and conditions set out in the Master Services Agreement, alternatively to propose required changes to such terms and conditions;

10.6.2.2 Each comment and/or amendment must be fully explained; and

10.6.2.3 All changes and/or amendments to the Master 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 a Bidder if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

11 EVALUATION AND SELECTION CRITERIA

SARS has set minimum standards (Gates) that a Bidder(s) needs to meet in order to be evaluated and shortlisted to a panel for marketing, advertising and related services. The minimum standards consist of the following Gates:

- **Pre-Qualification Criteria (Gate 0)** – Bidder(s) must submit all Standard Bidding Documents as outlined in paragraph 11.1.
- **Technical Evaluation Criteria (Gate 1)** – Bidder(s) will be evaluated out of 100 points during Technical Evaluations. The bidders will be ranked and shortlisted per category in which they have tendered. The process for the shortlisted bidders is outlined in paragraph 11.2.
- **Price and B-BBEE evaluation (Gate 2)** – Bidders that have been shortlisted in Gate 1 will be evaluated for B-BBEE as outlined in paragraph 11.3.

11.1 PRE-QUALIFICATION CRITERIA – GATE 0

Without limiting the generality of SARS's other critical requirements for this Bid, a Bidder must submit the documents listed in Table 11A below. Documents must be completed and signed by the duly authorised representative of the prospective Bidder. The Bidder's proposal may be disqualified for non-submission of any of the documents.

Table 11A: Documents that must be submitted for Pre-Qualification

Name of the document that must be submitted	Non-submission may result in disqualification
Tax Clearance Certificate – SBD 2	YES – Please submit a valid and original certificate.
SARS' s Oath of Secrecy	YES – Please complete and sign the supplied pro forma document in the presence of a Commissioner of Oaths and initial every page.
Invitation to Bid – SBD 1	YES – Please complete and sign the supplied pro forma document.
Declaration of Interest – SBD 4	YES – Please complete and sign the supplied pro forma document.
Preference Point Claim Form – SBD 6.1	NO – Non-submission will lead to a zero score for B-BBEE.
Declaration of Bidder's Past Supply Chain Management Practices – SBD 8	YES – Please complete and sign the supplied pro forma document.
Certificate of Independent Bid Determination – SBD 9	YES – Please complete and sign the supplied pro forma document.

11.2 TECHNICAL EVALUATION (GATE 1) = 100 POINTS

Only Bidder(s) that have met the Pre-Qualification Criteria in (Gate 0) will be evaluated in Gate 1 for functionality. Bidder(s) will be scored out of a maximum of 100 points, in each category they have tendered for. Thereafter, Bidders will be ranked according to the points achieved. The top five (5) Bidders in each category will be shortlisted and evaluated further for B-BBEE. Financial Statement Analysis will be used to determine the financial stability of the shortlisted bidder(s) in each category. The table below provides a summary of the technical evaluations of the three (3) Categories A, B and C.

Table 11B: Technical Evaluations by Category

Category	Maximum Points Allocation	Shortlist
CATEGORY A Marketing and Advertising	100	<ul style="list-style-type: none"> Bidders scored out of 100 points Bidders ranked according to points achieved Top five (5) Bidders shortlisted
CATEGORY B Events Management	100	<ul style="list-style-type: none"> Bidders scored out of 100 points Bidders ranked according to points achieved Top five (5) Bidders shortlisted
CATEGORY C Marketing and Advertising related Research	100	<ul style="list-style-type: none"> Bidders scored out of 100 points Bidders ranked according to points achieved Top five (5) Bidders shortlisted

Bidders must note that they may submit proposals in one or more of the above categories. Each category will however be evaluated separately.

11.3 PRICE AND B-BBEE EVALUATION (GATE 2) (0 + 10) = 10 POINTS

11.3.1 Stage 1 – Price Evaluation (0 points)

Bidders will not be evaluated and scored for Pricing. Successful bidders appointed to the panel will be required to quote when competing for a Service Request.

11.3.2 Stage 2 – B-BBEE Evaluation (10 points)

B-BBEE points may be allocated to Bidders on submission of the following documentation:

Adjudication Criteria	Points
A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1), including paragraph 8 thereof relating to the sub-contracting of the services, and a B-BBEE Certificate.	10

The checklist below indicates the B-BBEE documents that must be submitted for this tender. Failure to submit the required documents will result in service providers scoring zero (0) for B-BBEE.

Classification	Turnover	Submission Requirement
Exempted Micro Enterprise (EME)	Below R5 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA or a letter from an Accounting Officer as contemplated in the CCA.
Qualifying Small Enterprise (QSE)	Between R5 million and R35 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA.
Large Enterprise (LE)	Above R35 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA.

Bidders who do not claim Preference Points will be scored zero for B-BBEE, but cannot be excluded from the tender process for that reason. SARS will accept a B-BBEE Certificate issued on the revised B-BBEE Codes.

- Joint Ventures (JV) and Consortiums

Incorporated JVs must submit the B-BBEE status of the entity. Unincorporated JVs must submit a consolidated B-BBEE scorecard as if they were a group structure for every separate tender.

- Sub-contracting

Bidders who want to claim Preference Points will have to comply fully with regulation 11(8) and 11(9) of the PPPFA Act with regard to sub – contracting:

Regulation 11(8)

A person must not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub- contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an EME that has the capability and ability to execute the sub-contract.

Regulation 11(9)

A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the

contract is sub-contracted to an EME that has the capability and ability to execute the sub-contract.

11.4 FINANCIAL STATEMENTS

Bidders are required to submit complete sets of audited / reviewed annual financial statements 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 in each category. Bidders that are tendering for more than one category need only submit one (1) set of annual financial statements.

11.4.1 The annual financial statements must contain:

- Statement of Profit and Loss and Other Comprehensive Income;
- Statement of Financial Position;
- Statement of Cash Flows; and
- Accompanying Notes.

11.4.2 Entities which are trading for less than three (3) financial periods should provide:

- A letter detailing that fact, signed by a duly authorised representative of the entity; and
- Any other information or documentation which would provide more clarity on the financial history of the bidder.

11.4.3 In the event that the subsidiary is the bidding entity and submits the financial statements of the holding company for financial evaluation purposes, the holding company must furnish a Performance Guarantee that is signed by a duly authorised representative of the entity.

11.4.4 In the event of the bid being in the form of a JV, the following is required:

- Annual financial statements of the JV; and
- A JV legal agreement detailing the percentage ownership of each entity.

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

12 SPECIAL CONDITIONS OF THIS BID

12.1 SARS reserves the right:

12.1.1 Not to award or to cancel this bid at any time and shall not be bound to accept the lowest or any bid;

12.1.2 To negotiate with one or more Preferred Bidder(s) identified in the evaluation process, regarding any terms and conditions, including price without offering the same opportunity to any other Bidder(s) who has not been awarded the status of the Preferred Bidder(s);

12.1.3 To accept part of a Bid rather than the whole Bid;

12.1.4 To cancel and/or terminate the Bid process at any stage, including after the Closing Date and/or after presentations have been made, and/or after Bids have been evaluated and/or after the Preferred Bidder(s) have been notified of their status as such; and/or

12.1.5 To correct any mistakes at any stage of the Bid that may have been in the Bid documents or that occurred at any stage of the Bid process.

12.2 Insurance

12.2.1 Successful bidders in Categories A and C will be required, on or before the Effective Date of the Master Services Agreement and for the duration of the Agreement, to have and maintain in force adequate insurance cover consistent with acceptable and prudent business practices and acceptable to SARS, which shall include, without limitation, professional indemnity insurance cover.

12.2.2 SARS may require successful bidders to take out public liability insurance for certain Category B services.

12.3 SARS requires Bidder(s) to declare

In the Bidder's Technical response, Bidder(s) are required to declare the following:

12.3.1 Confirm that the Bidder(s) is to:

12.3.1.1 Act honestly, fairly, and with due skill, care and diligence, in the interests of SARS;

12.3.1.2 Have and employ effectively the resources, procedures and appropriate technological systems for the proper performance of professional activities;

12.3.1.3 Act with circumspection and treat SARS fairly in a situation of conflicting interests;

12.3.1.4 Comply with all applicable statutory or common law requirements applicable to the conduct of business;

12.3.1.5 Make adequate disclosures of relevant material information including disclosures of actual or potential own interests, in relation to dealings with SARS;

12.3.1.6 Avoid fraudulent and misleading advertising, canvassing and marketing;

12.3.1.7 Conduct its business activities with transparency and consistently uphold the interests and needs of SARS as a client before any other consideration; and

12.3.1.8 Ensure that any information acquired by the Bidder(s) from SARS will not be used or disclosed unless the written consent of the client has been obtained to do so.

12.4 CONFLICT OF INTEREST, CORRUPTION AND FRAUD

SARS reserves its right to 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"):

- 12.4.1 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 Bid;
- 12.4.2 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;
- 12.4.3 Makes or offers any gift, gratuity, anything of value or other inducement, whether lawful or unlawful, to any of SARS's officers, directors, employees, advisors or other representatives;
- 12.4.4 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;
- 12.4.5 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;
- 12.4.6 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; has in the past engaged in any matter referred to above; or
- 12.4.7 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.

12.5 MISREPRESENTATION DURING THE TENDER PROCESS AND LIFECYCLE OF THE CONTRACT

The Bidder should note that the terms of its Tender will be incorporated in the proposed contract by reference and that SARS relies upon the Bidder's Tender as a material representation in making an award to a successful Bidder and in concluding an agreement with the Bidder.

It follows therefore that misrepresentations in a Tender may give rise to service termination and a claim by SARS against the

Bidder notwithstanding the conclusion of the Master Services Agreement between SARS and the Bidder for the provision of the Service in question. In the event of a conflict between the Bidder's proposal and the Master Services Agreement concluded between the parties, the Agreement will prevail.

12.6 PREPARATION COSTS

The Bidder will bear all its costs in preparing, submitting and presenting any response or tender to this Bid and all other costs incurred by it throughout the Bid process. Furthermore, no statement in this Bid 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 Bid.

12.7 INDEMNITY

If a Bidder breaches the conditions of this Bid 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 Bid 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.

12.8 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.

12.9 LIMITATION OF LIABILITY

A Bidder participates in this Bid 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 Bid process.

12.10 TAX COMPLIANCE

No tender shall be awarded to a Bidder whose tax affairs are not in order. 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, or has submitted a fraudulent Tax Clearance Certificate (TCC) to SARS. 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. The Bidder will be required to submit a TCC upon expiration thereof, annually.

12.11 NATIONAL TREASURY

No tender shall be awarded to a Bidder whose name (or any of its members, directors, partners or trustees) appears 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.

12.12 GOVERNING LAW

South African law governs this Bid and the Bid 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 Bid, the Bid itself and all processes associated with the Bid.

12.13 RESPONSIBILITY FOR SUB-CONTRACTORS AND BIDDER'S PERSONNEL

A Bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives), its sub-contractors (if any) and personnel of its sub-contractors comply with all terms and conditions of this Bid and in particular the provisions of paragraph 12.15 below. In the event that SARS allows a Bidder to make use of sub-contractors, such sub-contractors will 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 or caused by such sub-contractors.

12.14 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 Bid or a Bidder's Tender(s) will be disclosed by any Bidder or other person not officially involved with SARS's examination and evaluation of a Tender.

No part of the Bid 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 Bid 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 there from.

Throughout this Bid 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 Bid relates; or (ii) the process which follows this Bid. Failure to adhere to this requirement may result in disqualification from the Bid process and civil action.

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.

12.15 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.



12.16 SARS PROPRIETARY INFORMATION

A Bidder must make a declaration on their Bid covering letter that they did not have access to any 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.

ORIGINAL

CATEGORY A – MARKETING AND ADVERTISING TECHNICAL EVALUATION SCOREDCARD

No.	Category A: Marketing and Advertising	Weight
13.1	Company Profile and Resources	
13.1.1	Provide: <ul style="list-style-type: none"> Company profile, organisational structure and infrastructure to render the services; Indicate a range of in-house services provided specific to creative advertising; Staff complement; Level of expertise of key personnel that may be recommended to SARS, their accessibility, qualifications and competencies relevant to the scope of services; and Full contact details of the key contact person / Accounts Manager. 	30
13.2	Capability	
13.2.1	Provide: A schedule of the bidder's experience and proven track record over the past four (4) years. The information provided for each client (a minimum of 3) must include: <ul style="list-style-type: none"> Client name; Contact person, phone number, company business address; Contract period; Description of a project / campaign; Value of the project; Challenges; and Value-added services. Please note that SARS will sample and reserves the right to contact the clients for a reference check. It is important to ensure that the clients listed on the bidder's schedule are contactable.	30
13.2.2	Provide: <ul style="list-style-type: none"> The number of accounts retained and lost over the past four (4) years. 	
13.2.3	Provide (in not more than 1500 words): One (1) recent case study including- <ul style="list-style-type: none"> Approach / methodology used to execute a project; Demonstrate skills and experience of resources; and Return on Investment that the bidder secured for the client. 	

13.3	SARS Brand	
13.3.1	Demonstrate: (in not more than 500 words): <ul style="list-style-type: none"> • An understanding of the SARS Brand and its mandate; and • An understanding of challenges facing the SARS brand and how these could be addressed. 	20
13.4	Skills and Knowledge Transfer	
13.4.1	Demonstrate: <ul style="list-style-type: none"> • The Bidder's approach to ensure skills and knowledge transfer to SARS's staff. 	10
13.5	Testimonials	
13.5.1	Provide two (2) most recent testimonials from any clients, where similar services were provided. The testimonials must include but not be limited to: <ul style="list-style-type: none"> • Brief description of services rendered; • Quality of service; • Performance; and • Work within budget / Cost. 	10
	TOTAL	100

CATEGORY B – EVENTS MANAGEMENT TECHNICAL EVALUATION SCOREDCARD

No.	Category B: Events Management	Weight
14.1	Company Profile and Resources	
14.1.1	<p>Provide:</p> <ul style="list-style-type: none"> • Company profile, organisational structure and infrastructure to render the services; • Indicate a range of in-house services provided specific to events management; • Staff complement; • Level of expertise of key personnel that may be recommended to SARS, their accessibility, qualifications and competencies relevant to the scope of services; and • Full contact details of the key contact person / Accounts Manager. 	40
14.2	Capability	
14.2.1	<p>Provide:</p> <p>A schedule of the bidder's experience and proven track record over the past four (4) years.</p> <p>The information provided for each client (a minimum of 3) must include:</p> <ul style="list-style-type: none"> • Client name; • Contact person, phone number, company business address; • Contract period; • Description of an event; • Number of delegates; • Where applicable, indicate VIPs (e.g. Government, Board members, Ministers); • Value of the project; • Challenges; and • Value-added services. <p>Please note that SARS will sample and reserves the right to contact the clients for a reference check. It is important to ensure that the clients listed on the bidder's schedule are contactable.</p>	

14.2.2	<p>Provide (in not more than 1500 words for each case study):</p> <p>Two (2) most recent case studies demonstrating the bidder's experience in conceptualising and managing all aspects of corporate event management from start to end, this includes but is not limited to:</p> <ul style="list-style-type: none"> • Concept design; • Creative direction; • Event production; • Creation of corporate collateral; • Set design; • Technical staging; and • Logistical management. 	40
14.3	Testimonials	
14.3.1	<p>Provide two (2) most recent testimonials from any client, where similar services were provided. The testimonials must include but not be limited to:</p> <ul style="list-style-type: none"> • Brief description of services rendered; • Quality of service; • Performance; and • Work within budget / Cost. 	20
	TOTAL	100

15 ANNEXURE C1 – DOCUMENTATION REQUIRED

CATEGORY C – MARKETING AND ADVERTISING RELATED RESEARCH TECHNICAL SCOREDCARD

No.	Category C: Marketing and Advertising related Research	Weight
15.1	Company Profile and Resources	
15.1.1	<p>Provide:</p> <ul style="list-style-type: none"> Company profile, organisational structure and infrastructure to render the services; Indicate a range of in-house services provided specific to marketing and advertising related research; Staff complement; Level of expertise of key personnel that may be recommended to SARS, their accessibility, qualifications and competencies relevant to the scope of services; and Full contact details of the key contact person / Accounts Manager. 	40
15.2	Capability	
15.2.1	<p>Provide:</p> <p>A schedule of the bidder's experience and proven track record over the past four (4) years. The information provided for each client (a minimum of 3) must include:</p> <ul style="list-style-type: none"> Client name; Contact person, phone number, company business address; Contract period; Description of a project/research; Value of the project; Challenges; and Value-added services. <p>Please note that SARS will sample and reserves the right to contact clients for a reference check. It is important to ensure that the clients listed on the bidder's schedule are contactable.</p>	40
15.2.2	<p>Provide (in not more than 1500 words for each case study):</p> <p>Two (2) most recent case studies demonstrating the bidder's experience in marketing and advertising related research by detailing the challenges faced, solutions implemented and the benefits (ROI) derived for the respective clients.</p>	

15.3	Skills and Knowledge Transfer	
15.3.1	Demonstrate: <ul style="list-style-type: none"> The Bidder's approach to ensure skills and knowledge transfer to SARS's staff. 	10
15.4	Testimonials	
15.4.1	Provide two (2) most recent testimonials from any clients, where similar services were provided. The testimonials must include but not be limited to: <ul style="list-style-type: none"> Brief description of services rendered; Quality of service; Performance; and Work within budget / Cost. 	10
	TOTAL	100

16 ANNEXURE A2: BIDDER TECHNICAL COMPLIANCE CHECKLIST

Please refer to paragraph 9 to complete this form. The form must be submitted in File 1, Exhibit 2.

Example on how to complete the compliance checklist:

Paragraph No.	Technical Criteria	Compliant	Partially Compliant	Non - Compliant	Reference page in Proposal	Comments
9.6.1.	Company Profile and Resources	Yes			Page 6 to 9 - Exhibit 2	
9.6.2	Capability		Yes		Page 6 to 9 - Exhibit 2	Bidder to state reason for partial compliance.
9.6.3	SARS Brand			No	Page 6 to 9 - Exhibit 2	Bidder to state reason for non-compliance.

Please refer to paragraph 9 to complete this form. The form must be submitted.

Paragraph No. 9	Technical Criteria	Compliant	Partially Compliant	Non-Compliant	Reference page in Proposal	Comments
9.6.1						
9.6.2						
9.6.3						
9.6.4						
9.6.5						

17 ANNEXURE B2: BIDDER TECHNICAL COMPLIANCE CHECKLIST

Please refer to paragraph 9 to complete this form. The form must be submitted in File 2, Exhibit 2.

Example on how to complete the compliance checklist:

Paragraph No.	Technical Criteria	Compliant	Partially Compliant	Non - Compliant	Reference page in Proposal	Comments
9.7.1.	Company Profile and Resources	Yes			Page 6 to 9 - Exhibit 2	
9.7.2	Capability		Yes		Page 6 to 9 - Exhibit 2	Bidder to state reason for partial compliance.
9.7.3	Testimonials			No	Page 6 to 9 - Exhibit 2	Bidder to state reason for non-compliance.

Please refer to paragraph 9 to complete this form. The form must be submitted.

Paragraph No. 9	Technical Criteria	Compliant	Partially Compliant	Non-Compliant	Reference page in Proposal	Comments
9.7.1						
9.7.2						
9.7.3						

18 ANNEXURE C2: BIDDER TECHNICAL COMPLIANCE CHECKLIST

Please refer to paragraph 9 to complete this form. The form must be submitted in File 3, Exhibit 2.

Example on how to complete the compliance checklist:

Paragraph No.	Technical Criteria	Compliant	Partially Compliant	Non - Compliant	Reference page in Proposal	Comments
9.8.1.	Company Profile and Resources	Yes			Page 6 to 9 - Exhibit 2	
9.8.2	Capability		Yes		Page 6 to 9 - Exhibit 2	Bidder to state reason for partial compliance.
9.8.3	Skills and Knowledge Transfer			No	Page 6 to 9 - Exhibit 2	Bidder to state reason for non-compliance.

Please refer to paragraph 9 to complete this form. The form must be submitted.

Paragraph No. 9	Technical Criteria	Compliant	Partially Compliant	Non-Compliant	Reference page in Proposal	Comments
9.8.1						
9.8.2						
9.8.3						
9.8.4						