

SUMMARY OF TOWER C' MANDATORY AND TECHNICAL EVALUATION CRITERIA FOR WHICH SARS SEEKS MARKET INPUT OR RECOMMENDATIONS.

1. PREAMBLE

Here is a summary of Tower C (Communication/s Platform as a Service) and the mandatory, technical evaluation criteria for which SARS seeks market input or recommendations.

Communication/s Platform as a Service Tower (CPaaS) (Tower C)	<p>The supply of a Unified Communication/s Platform as a Service Carrier (CPaaS) for services that include:</p> <ul style="list-style-type: none">- The replacement of <i>current</i> services including carriage of computer-generated SMS, Unstructured Supplementary Service Data (USSD), short URL messages (e.g. bit.ly), and <i>possible future services</i> including bulk email messages, printed letters, <i>social media</i>, live chat, and artificial intelligence (AI) or large language models (LLM) through operators to clients; and <p>Related Communications Platform as a Service (CPaaS) Carrier common service such as account management, monitoring & reporting, support, consulting, and advisory services.</p>
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1.1. Tower C

Tower C is divided into four (4) categories, namely, Category A, Category B, Category C, and Category D. A Bidder can respond to any one combination of the four (4) categories.

The categories are:

Category A: operating capacity for SMS, USSD, or short-message code (e-Booking) messages, short URL (e.g. bit.ly), MMS; and operating capacity for SMS traffic. SARS intends to award the scope of Tower C (SMS) — Category A — to a minimum of two (2) service providers. During the term, SARS will periodically, at least once a year, update the routing algorithms for its SMS traffic to the service providers based on quality, availability, performance, and pricing, as service providers improve their offering.

SARS will award the operating capacity for SMS, or short-message code messages, traffic to a minimum of two (2) service providers that ranked high after consolidation of Price and Specific goals. A Bidder

responding to this requirement must complete the following tabs in the *SARS RFP 04-2025 5-3-C Tower C Pricing Response Template Category A*: TC.1, TC.2, TC.5, TC.6, and TC.7.

SARS will award the USSD services to a single service provider ranked number 1 after consolidation of Pricing and Specific goals. A Bidder responding to this requirement must complete the following tabs in the *SARS RFP 04-2025 5-3-C Tower C Pricing Response Template Category A*: TC.4, TC.6, and TC.7.

SARS will award the short URL to a single service provider ranked number 1 after consolidation of Pricing and Specific goals. A Bidder responding to this requirement must complete the following tabs in the *SARS RFP 04-2025 5-3-C Tower C Pricing Response Template Category A*: TC.3, T.6, and TC.7.

Category B: operating capacity for bulk email messages. SARS will appoint a panel of service providers, because this category comprises technical requirements that SARS may have in the future. All service providers that meet the required threshold after technical evaluation will be appointed to the panel and, when the need arises, SARS will issue a Request for a Quotation (RFQ) to all the service providers on the panel to quote for the services.

Depending on the nature of the future requirements that SARS will require during the contract period within the scope of Category B, SARS will issue an RFQ that will be evaluated under the following options:

- Appoint a Bidder on technical evaluation criteria (where technical capacity is a requirement for new request), and on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.
- Appoint a Bidder based on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.

Category C: operating capacity for printed letters. SARS will appoint a panel of service providers, as these are future requirements. All service providers that meet the technical evaluation criteria will be appointed on the panel and, when the need arises, SARS will issue an RFQ to all the service providers who have been appointed on the panel. Depending on the nature of SARS's requirements during the contract period within the scope of Category C, SARS will issue an RFQ that will be evaluated under the following options:

- Appoint a Bidder on technical evaluation criteria (where technical capacity is a requirement for

new request), and on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.

- Appoint a Bidder based on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.

Category D: operating capacity for social media, live chat and AI/LLM. All service providers that meet the technical evaluation criteria will be appointed to the panel and, when the need arises, SARS will issue an RFQ to all the service providers that will be appointed to the panel. Depending on the nature of SARS's requirements during the contract period within the scope of Category D, SARS will issue an RFQ that will be evaluated under the following options:

- Appoint a Bidder on technical evaluation criteria (where technical capacity is a requirement for new request), and on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.
- Appoint a Bidder based on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.

2. MANDATORY EVALUATION CRITERIA FOR TOWER C

Table 2A: Mandatory Evaluation Criteria for Tower C, Category A

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, incorporated JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>
2.	Licences	<p>The Bidder must possess Independent Communications Authority of South Africa (ICASA) Individual ECS (I-ECS) regulatory licence to provide the services for which it is bidding in Tower C.</p> <p>NB: The Bidder must provide an official ICASA letter as proof of its licence(s). The Bidder may rely on regulatory licences held by a parent company or subsidiary, provided that the Bidder submits a satisfactory explanation of how such reliance will comply with regulatory requirements and provides a warranty of compliance. The Bidder may not rely on a third party's licence(s). The evidence of licence-holding must correspond with the licence(s) the Bidder claims to hold.</p>

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
3.	Security	<p>SARS aims to establish the alignment between SARS Security requirements and the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to implemented client(s).</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of secure Services in this Tower.</p> <ul style="list-style-type: none"> SARS also seeks to establish if the bidder's Service has the following mandatory components: <ol style="list-style-type: none"> IPSec: IPSec (Internet Protocol Security) is a set of protocols designed to secure internet communications by encrypting and authenticating data packets. It provides confidentiality, data integrity, and authentication for data transmitted across public networks through encrypted tunnels. IPSec supports various encryption methods and operates in two modes: tunnel mode (encrypts the entire packet) and transport mode (encrypts only the payload). It is widely used to create secure VPN connections. VPN: A Virtual Private Network (VPN) is a technology that creates a secure and encrypted connection over a less secure network, such as the internet. VPNs enable users to send and receive data as if their devices were directly connected to a private network, thereby providing privacy and security. An IPSec VPN uses the IPSec protocol to establish the encrypted tunnel that protects data traffic. Firewalls: Firewalls are security devices or software that monitor, and control incoming and outgoing network traffic based on predetermined security rules. They act as a barrier between trusted internal networks and untrusted external networks, protecting against unauthorized access and cyber threats. Firewalls filter traffic to block malicious or unwanted data while allowing legitimate communication. Encryption: Encryption is the process of converting plain text or data into a coded form (ciphertext) using an algorithm and an encryption key, making it unreadable to unauthorized parties. It ensures confidentiality and

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>protects sensitive information during storage or transmission. Decryption is the reverse process, requiring a key to convert the ciphertext back to its original form.</p> <p>5. RSA-based data centres: The bidder's data centres where SARS data may be stored must be in South Africa.</p> <p>The evidence must be provided by the Bidder in the form a declaration on the Bidder's letterhead signed by a duly appointed Director, and the declaration must indicate all requirements as stipulated in the ISO 27001 framework, as well as the comprehensive details for the mandatory requirements.</p>
4.	Operating Capacity for SMS, USSD, or Short Message Code Messages	<p>The Bidder must be able to carry at least 70 000 000 (seventy million) SMS, USSD or short-message code messages over a period of 12months.</p> <p>NB: A Bidder must submit a declaration on the Bidder company letterhead, signed by a director authorised to represent the company that affirms that the Bidder:</p> <ol style="list-style-type: none"> 1. Can carry at least 70 000 000 (seventy million) SMS, USSD, or short-message code messages to any cell phone network locally and; 2. Can carry to any cell phone network internationally; and that 3. The bidder has been operating for a consecutive period of 12 months. <p>NB: If the signed declaration letter is missing any of the three (3) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
5.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend this compulsory briefing session, the Bidder will be disqualified.</p>
6.	Compulsory price-schedules workshop session (Hybrid)	<p>The Bidder(s) must have attended the compulsory price-schedules workshop session.</p> <p>NB: An attendance register will be taken at the compulsory price-schedules workshop session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend this compulsory price-schedules workshop session, the Bidder will be disqualified.</p>

Table 2B: Mandatory Evaluation Criteria for Tower C, Category B

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and operate in South Africa.</p>

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.
2.	Licences	<p>The Bidder must possess Independent Communications Authority of South Africa (ICASA) Individual ECS (I-ECS) regulatory licence to provide the services for which it is bidding in Tower C.</p> <p>NB: The Bidder must provide an official ICASA letter as proof of its licence(s). The Bidder may rely on regulatory licences held by a parent company or subsidiary, provided that the Bidder submits a satisfactory explanation of how such reliance will comply with regulatory requirements and provides a warranty of compliance. The Bidder may not rely on a third party's licence(s). The evidence of licence-holding must correspond with the licence(s) the Bidder claims to hold.</p>
3.	Security	<p>SARS aims to establish the alignment between SARS Security requirements and the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to implemented client(s).</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of secure Services in this Tower.</p> <ul style="list-style-type: none"> • SARS also seeks to establish if the bidder's Service has the following mandatory components: <ol style="list-style-type: none"> 1. IPSec: IPSec (Internet Protocol Security) is a set of protocols designed to secure internet communications by encrypting and authenticating data packets. It provides confidentiality, data integrity, and authentication for data transmitted across public networks through encrypted tunnels. IPSec supports various encryption methods and

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>operates in two modes: tunnel mode (encrypts the entire packet) and transport mode (encrypts only the payload). It is widely used to create secure VPN connections.</p> <ol style="list-style-type: none"> 2. VPN: A Virtual Private Network (VPN) is a technology that creates a secure and encrypted connection over a less secure network, such as the internet. VPNs enable users to send and receive data as if their devices were directly connected to a private network, thereby providing privacy and security. An IPSec VPN uses the IPSec protocol to establish the encrypted tunnel that protects data traffic. 3. Firewalls: Firewalls are security devices or software that monitor, and control incoming and outgoing network traffic based on predetermined security rules. They act as a barrier between trusted internal networks and untrusted external networks, protecting against unauthorized access and cyber threats. Firewalls filter traffic to block malicious or unwanted data while allowing legitimate communication. 4. Encryption: Encryption is the process of converting plain text or data into a coded form (ciphertext) using an algorithm and an encryption key, making it unreadable to unauthorized parties. It ensures confidentiality and protects sensitive information during storage or transmission. Decryption is the reverse process, requiring a key to convert the ciphertext back to its original form. 5. RSA-based data centres: The bidder's data centres where SARS data may be stored must be in South Africa. <p>The evidence must be provided by the Bidder in the form a declaration on the Bidder's letterhead signed by a duly appointed Director, and the declaration must indicate all requirements as stipulated in the ISO 27001 framework, as well as the comprehensive details for the mandatory requirements.</p>
4.	Operating Capacity for Bulk Email	The Bidder must be able to carry at least 10 000 000 (ten million) email messages over a period of 12 months

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
	Messages	<p>NB: A Bidder must submit a declaration on the Bidder company letterhead, signed by a director authorised to represent the company that affirms that the Bidder:</p> <ol style="list-style-type: none"> 1. Can carry at least 10 000 000 (ten million) emails to any email address locally; and 2. Can send emails internationally; and that 3. The bidder has been operating for a consecutive period of 12 months. <p>NB: If the signed declaration letter is missing any of the three (3) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
5.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend this compulsory briefing session, the Bidder will be disqualified.</p>

Table 2C: Mandatory Evaluation Criteria for Tower C, Category C

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, incorporated JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>
2.	Compliance with SAPO regulations	<p>The Bidder must declare that it complies with current South African Post Office (SAPO) regulations to provide the services for which it is bidding in Tower C.</p> <p>NB: The Bidder must submit a declaration signed by a director authorised to do so, stating that the Bidder is compliant with relevant SAPO regulations.</p>
3.	Security	<p>SARS aims to establish the alignment between SARS Security requirements and the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to implemented client(s).</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of secure Services in this Tower.</p> <ul style="list-style-type: none"> SARS also seeks to establish if the bidder's Service has the following mandatory components:

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<ol style="list-style-type: none"> 1. IPsec: IPsec (Internet Protocol Security) is a set of protocols designed to secure internet communications by encrypting and authenticating data packets. It provides confidentiality, data integrity, and authentication for data transmitted across public networks through encrypted tunnels. IPsec supports various encryption methods and operates in two modes: tunnel mode (encrypts the entire packet) and transport mode (encrypts only the payload). It is widely used to create secure VPN connections. 2. VPN: A Virtual Private Network (VPN) is a technology that creates a secure and encrypted connection over a less secure network, such as the internet. VPNs enable users to send and receive data as if their devices were directly connected to a private network, thereby providing privacy and security. An IPsec VPN uses the IPsec protocol to establish the encrypted tunnel that protects data traffic. 3. Firewalls: Firewalls are security devices or software that monitor, and control incoming and outgoing network traffic based on predetermined security rules. They act as a barrier between trusted internal networks and untrusted external networks, protecting against unauthorized access and cyber threats. Firewalls filter traffic to block malicious or unwanted data while allowing legitimate communication. 4. Encryption: Encryption is the process of converting plain text or data into a coded form (ciphertext) using an algorithm and an encryption key, making it unreadable to unauthorized parties. It ensures confidentiality and protects sensitive information during storage or transmission. Decryption is the reverse process, requiring a key to convert the ciphertext back to its original form. 5. RSA-based data centres: The bidder's data centres where SARS data may be stored must be in South Africa.

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>The evidence must be provided by the Bidder in the form a declaration on the Bidder's letterhead signed by a duly appointed Director, and the declaration must indicate all requirements as stipulated in the ISO 27001 framework, as well as the comprehensive details for the mandatory requirements.</p>
4.	Operating Capacity for Printed Letters	<p>The Bidder must be able to carry at least 10 000 000 (ten million) printed letters over a period of 12 months</p> <p>NB: A Bidder must submit a declaration on the Bidder company letterhead, signed by a director authorised to represent the company that affirms that the Bidder can</p> <ol style="list-style-type: none"> 1. carry at least 10 000 000 (ten million) printed letters to any address locally and; 2. can send printed letters internationally; and that 3. The bidder has been in business for a consecutive period of 12-months. <p>NB: If the signed declaration letter is missing any of the three (3) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
5.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the Mandatory requirement, per the Mandatory Response template). If the Bidder does not attend this compulsory briefing session, the Bidder will be disqualified.</p>

Table 2D: Mandatory Evaluation Criteria for Tower C, Category D

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and the Bidder must operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, incorporated JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>
2.	Licences, if applicable	<p>The Bidder must possess Independent Communications Authority of South Africa (ICASA) Individual ECS (I-ECS) regulatory licence or similar licensing authority or regulation, to provide the services for which it is bidding in Tower C, if applicable.</p> <p>NB: The Bidder must provide an official ICASA letter as proof of its licence(s). The Bidder may rely on regulatory licences held by a parent company or subsidiary, provided that the Bidder submits a satisfactory explanation of how such reliance will comply with regulatory requirements and provides a warranty of compliance. The Bidder may not rely on a third party's licence(s). The evidence of licence-holding must correspond with the licence(s) the Bidder claims to hold.</p>
3.	Security	<p>SARS aims to establish the alignment between SARS Security requirements and the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to implemented client(s).</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of secure Services in this Tower.</p>

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<ul style="list-style-type: none"> • SARS also seeks to establish if the bidder's Service has the following mandatory components: <ol style="list-style-type: none"> 1. IPsec: IPsec (Internet Protocol Security) is a set of protocols designed to secure internet communications by encrypting and authenticating data packets. It provides confidentiality, data integrity, and authentication for data transmitted across public networks through encrypted tunnels. IPsec supports various encryption methods and operates in two modes: tunnel mode (encrypts the entire packet) and transport mode (encrypts only the payload). It is widely used to create secure VPN connections. 2. VPN: A Virtual Private Network (VPN) is a technology that creates a secure and encrypted connection over a less secure network, such as the internet. VPNs enable users to send and receive data as if their devices were directly connected to a private network, thereby providing privacy and security. An IPsec VPN uses the IPsec protocol to establish the encrypted tunnel that protects data traffic. 3. Firewalls: Firewalls are security devices or software that monitor, and control incoming and outgoing network traffic based on predetermined security rules. They act as a barrier between trusted internal networks and untrusted external networks, protecting against unauthorized access and cyber threats. Firewalls filter traffic to block malicious or unwanted data while allowing legitimate communication. 4. Encryption: Encryption is the process of converting plain text or data into a coded form (ciphertext) using an algorithm and an encryption key, making it unreadable to unauthorized parties. It ensures confidentiality and protects sensitive information during storage or transmission. Decryption is the reverse process, requiring a key to convert the ciphertext back to its original form. 5. RSA-based data centres: The bidder's data centres where SARS data may be stored must be in South Africa.

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>The evidence must be provided by the Bidder in the form a declaration on the Bidder's letterhead signed by a duly appointed Director, and the declaration must indicate all requirements as stipulated in the ISO 27001 framework, as well as the comprehensive details for the mandatory requirements.</p>
4.	<p>Operating Capacity for social media, Live Chat and AI/LLM</p>	<p>The Bidder must be able to carry at least 10 000 000 (ten million) live chat messages over a period of 12 months.</p> <p>NB: A Bidder must submit a declaration on the Bidder company letterhead, signed by a director authorised to represent the company that affirms that the Bidder:</p> <ol style="list-style-type: none"> 1. Can carry at least 10 000 000 (ten million) live chat messages to/from any device locally and; 2. To/from any device internationally. 4. The bidder has been in business for a consecutive period of 12-months. <p>NB: If the signed declaration letter is missing any of the three (3) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
5.	<p>Compulsory Briefing Session (Hybrid)</p>	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend this compulsory briefing session, the Bidder will be disqualified.</p>

3. TECHNICAL EVALUATION PROCESS (GATE 2)

- 3.1. Only bidders that have met the prequalification and mandatory evaluation requirement will be evaluated for technical capability and functionality, strictly according to the technical evaluation criteria below. A bidder is required to provide a technical solution for the required information and services that meet SARS' requirements, and that is financially competitive and offers value for money.
- 3.2. The technical evaluation will be scored out of a total of 100 points, and bidders are required to score a minimum threshold of **66.67 out of 100** points to proceed to the next stage of evaluation, namely price and B-BBEE/specific goals evaluation.
- 3.3. If a bidder does not meet the technical evaluation minimum threshold, the bidder will be disqualified, and the bidder's proposal will not be considered further.

NOTE:

To ensure that an objective and consistent evaluation is conducted of the proposed bidder's solution a structured scoring methodology will be used.

Each criterion is allocated a weight based on relative importance and a 4-point scale of 0,1,2 and 3 is used to assess the proposal as follows:

3 - The bidder fully meets requirements and value adding is extensive

2 - Meets critical requirements

1 - Partially meets requirements

0 - Company cannot meet, high risk

The calculation of your weighted score by the SARS evaluation committee will be based on the weight of the criteria factored by the 4-point scale. Example weight of 10, 0 equates to 0, 1 equates to 3,33, 2 equates to 6,67 and 3 equates to 10). These will vary according to the different weighting criteria.

The weighted score will be tallied for all criteria and bids that fail to meet the minimum threshold of 66.67 will not proceed to the next stage of evaluation.

Table 3A: Technical Evaluation Criteria for Tower C, Category A

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion Evaluation				
1.1.	Direct Links to Mobile Network Operators		20		

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.1.	<p>Infrastructure Architectural Diagram & Description. Show the following components on your diagram and provide a description of each of the components below:</p> <ul style="list-style-type: none"> • IPSEC • VPN • Firewalls • Encryption • South Africa based data centres • Redundancy • Underlying carriers • Single points of failure • Links to MNOs. <p>SARS aims to establish the Bidder's current capability to deliver SMS, USSD, MMS, and short URL messages across secure links to mobile operators (MOs).</p> <p>A Bidder must demonstrate that it is currently carrying SMS traffic directly to all South African MNOs. The Bidder will be required to provide a confirmation letter from each mobile network operator.</p>	<p>3: The bidder has provided a high-level infrastructure architectural diagram that clearly shows the components (datacentres, servers, networks, security layers, cell phone towers, handsets) of the SMS, USSD, MMS, short messages and shortened URL solution proposed. It must show the links to each of the components mentioned below from IPSEC to Data centres. Each component must be described in as much details as necessary. Confirmation letters from each of the MNOs is attached</p> <p>2: Two or less components are not included in the diagram or descriptions of the components are insufficient The MNO letters are attached.</p> <p>1: More than two components are not included in the diagram or descriptions of the components are insufficient. The MNO letters are attached.</p> <p>0: The bidder has not provided all the details required. The letters from the MNOs are not attached.</p>	20		Complete the Technical Response Template (TRT) & provide an Infrastructure Architectural Diagram & Description
2	Skills & experience				
2.1	Skills		10		

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
2.1 .1.	<p>Account Manager - Technical account management skills (minimum of 3 years' project-management and ITSM experience and ITIL Foundation or COBIT 5 certification).</p> <p>SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects/assignments run from SARS's head office, or at SARS sites nationwide. A Bidder who can show sufficient coverage of all technical-skill categories available for such assignments will be eligible to achieve maximum points for this sub-criterion.</p>	<p>3: Resource has 3+ years' experience, relevant documentation is provided (CV) and holds ITIL Foundation or COBIT 5 certification. Demonstrates added value (e.g., advanced ITSM knowledge, leadership in similar projects).</p> <p>2: Resource has at least 3 years' experience and relevant documentation is provided (CV) but lacks ITIL Foundation or COBIT 5 certification.</p> <p>1: Resource has some relevant experience but less than 3 years, or documentation is incomplete or unclear.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV, certifications) is provided.</p>	4		Complete the Technical Response Template (TRT) and provide a CV
2.1.2.	<p>Technical Resources – Network engineer, Firewall, testing resource, communication solution design and MQ or architecture skills - minimum of 5 years' experience (it is permissible for one resource to cover different roles).</p>	<p>3: Resources have 5+ years' experience with full documentation (CV) and demonstrate relevant experience.</p> <p>2: Resources have 3–4 years' experience with full documentation (CV, relevant experience).</p> <p>1: Resources have 3–4 years' experience, but documentation is incomplete or lacks clarity.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV) is provided.</p>	6		Complete the Technical Response Template (TRT) and provide a CV
3	Technical Solution Criterion				
3.1.	SMS, USSD, Short Message, MMS, Short URL Link Carrier Solution		40		
3.1.1.	<p>Application Architecture: SMS, USSD, Short Message, MMS, Short URL link Carrier Solution.</p> <p>SARS seeks information to establish whether the Bidder has a fully developed and operational message-carrier solution that will meet SARS's integrated message-carrier-service requirements. Bidders who propose a full solution with no single points of failure will receive maximum</p>	<p>3: The bidder has provided a high-level application architecture diagram & detailed description of the full message carrying solution (SMS, USSD, Short Message, MMS, Short URL) with links to the architecture diagram</p> <p>2: The bidder has provided a high-level application architecture diagram & detailed description of the full message carrying solution with one or two components missing.</p>	19		Complete the Technical Response Template (TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	points for this criterion. The Bidder must provide an architectural diagram specifying the components (SMS, USSD, Short Message, MMS, Short URL) of the solution, including a published API specification. The Bidder must also include the protocol supported (SMPP, SOAP-WS, Restful WS). A policy document stating how patches will be managed must be provided.	<p>1: The bidder has provided a high-level application architecture diagram & detailed description of the full message carrying solution with more than two components missing.</p> <p>0: The bidder has not provided the diagram, or the descriptions of all components required.</p>			
3.1.2.	Patch Policy, Timelines & Communication	<p>3: The bidder has provided their Patch Deployment Policy, a timeline for the next year, and the communication protocol to be used to inform SARS in advance of any patches being deployed.</p> <p>2: The bidder has not specified one of the above components.</p> <p>1: The bidder has not specified more than one of the above components.</p> <p>0: The bidder has not provided any of the details required.</p>	3		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.3.	SMS Delivery process	<p>3: The bidder has provided the SMS Delivery process description and diagram clearly showing the sequence of events during delivery of an SMS from the SARS core system to the taxpayer's handset and delivery confirmation back to SARS.</p> <p>2: One of the requirements have not been met</p> <p>1: More than one of the requirements have not been met</p> <p>0: The bidder has not provided any of the details required.</p>	3		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.4.	USSD Delivery process	<p>3: The bidder has provided the USSD Delivery process description and diagram clearly showing the sequence of events during processing of a USSD session from the taxpayer to and from SARS core systems.</p> <p>2: One of the requirements have not been met</p> <p>1: More than one of the requirements have not been met</p>	3		Complete the Technical Response Template (TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		0: The bidder has not provided any of the details required.			
3.1.5.	MMS Delivery process	3: The bidder has provided the MMS Delivery process description and diagram clearly showing the sequence of events during delivery of an MMS from the SARS core system to the taxpayer's handset and delivery confirmation back to SARS 2: One of the requirements have not been met 1: More than one of the requirements have not been met 0: The bidder has not provided any of the details required.	3		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.6.	Short message URL (e.g. bit.ly) delivery process	3: The bidder has provided the short message URL (e.g. bit.ly) Delivery process description and diagram clearly showing the sequence of events during delivery of an SMS that contains a shortened URL and the taxpayer retrieving the message. Special emphasis to be placed on the security components for these transactions. 2: One of the requirements have not been met 1: More than one of the requirements have not been met 0: The bidder has not provided any of the details required.	3		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.7.	Published API that supports SMPP, SOAP, Restful, SMTP	3: The bidder has provided the published API specification that clearly shows that it supports SMPP, SOAP, REST and SMTP. 2: One of the requirements have not been met 1: More than one of the requirements have not been met 0: The bidder has not provided allay the details required.	3		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.8.	Scalability - Scalability in the application layer refers to the ability of an application to handle increasing amounts of load, users, data, or other resources without experiencing a significant decrease in performance or reliability	3: The bidder has provided the details that shows the scalability (horizontal & vertical scaling of infrastructure, servers, network, firewalls, load balancers, efficient algorithms, multi-threaded application design and code) of the Service Providers solution for SARS to understand the limits that the design place on SARS volumes.	3		Complete the Technical Response Template (TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		2: One of the requirements have not been met 1: More than one of the requirements have not been met 0: The bidder has not provided any of the details required.			
4	Service Management Solution Criterion				
4.1.	Service Management Maturity and Toolset Assessment		10		
4.1.1.	Comprehensive maturity assessments and toolset capabilities for: <ul style="list-style-type: none"> • Problem Management, • Incident Management • Service Request Management •Release Management •Change Management, • Event Management • Knowledge Management SARS aims to ensure that the Bidder has both the necessary processes and tools to effectively manage and support all critical Service Management areas.	3: The bidder has provided comprehensive maturity assessments and toolset capabilities for all management areas. 2: The bidder has provided maturity assessments and toolset capabilities with one or two missing requirements 1: The bidder has provided maturity assessments and toolset capabilities with three or more missing requirements 0: The bidder has not provided any of the required details for the management areas	10		Complete the Technical Response Template (TRT)
4.2.	Bidder's Solution for Monitoring and Reporting (M&R) Portal		10		
4.2.1.	Bidder's Solution for Monitoring and Reporting (M&R) Portal including: <ul style="list-style-type: none"> • Infrastructure & Application, Architecture diagram & Description • Platform/ Access • Delivery method 	3: The bidder has provided a solution which fully meets all specified requirements. 2: The Bidder has provided a solution with one or two missing requirements. 1: The Bidder has provided a solution with three or more missing requirements. 0: The bidder has not provided any of the required details for the M&R solution	10		Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	<ul style="list-style-type: none"> • Delivery Status Information • Near Real time monitoring • Ad Hoc reporting <p>SARS aims to assess the Bidder’s solution for its effectiveness in achieving the specifications as set out in the Business Requirements Specification. A Bidder must provide a high-level infrastructure & application architectural diagram of its monitoring and reporting tool. The solution should contain functionality to deal with near real-time monitoring of all relevant aspects of the channel (SMS, USSD, short messages, shortened URL), including circuits to the MOs, capacity utilisation of critical elements, and queue status. Additionally, the service provider must provide up-to-date monthly statistics for all in-scope elements of the SMS carrier services over the term of the agreement, including traffic volumes, incidents and problems, and a breakdown of volumes per channel. A Bidder must provide monitoring tools to analyse the outbound transactions to detect unusual usage and ensure reconciliation of invoices to SARS data. Real-time (or near-real-time) with no longer than 10 minutes’ delayed updating.</p>				
5	Transition		10		
5.1	Transition Team <p>SARS aims to assess the Bidder’s capability to transition the services effectively. All aspects of the transition team (team structure, escalation, key personnel, experience, & related qualifications) must be adequately explained by the Bidder’s proposal, supported by relevant documentation (CV’s) and it must present acceptable risk in achieving the requirements to score maximum points for this criterion. The key inquiry is: Does the Bidder’s proposal for transition include a formally defined transition team with these key roles Project manager, Network engineer, Firewall resource, Testing resource and MQ engineer? It is permissible for a resource to cover multiple roles.</p>				

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
5.1.1.	Transition Team	<p>3: The proposal defines a transition team with named personnel covering All key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided.</p> <p>2: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided.</p> <p>1: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are NOT provided.</p> <p>0: The proposal lacks a formally defined transition team. No named personnel, roles, or supporting documentation (e.g. CVs) are NOT provided.</p>	6		Complete the Technical Response Template (TRT)
5.2.	Transition Plan SARS aims to assess the Bidder's proposal for transitioning the services effectively. All requirements for transitioning must be included in the scope of the project: <ul style="list-style-type: none"> Technical changes on SARS & Service Provider platforms – Ensure compatibility and readiness of both SARS and the new Service Provider 's platforms Changeover – Execute switch from the current Service Provider to the new one, and disengage the current provider 				
5.2.1.	Transition Plan	<p>3: The proposal includes all required elements: technical changes, changeover, testing, and rollback. Each component is described with sufficient detail and supported by documentation. Risk mitigated.</p> <p>2: The proposal includes a basic transition plan but is missing one or two key components (e.g. rollback strategy or testing procedures). Limited detail or documentation. Risk to service continuity is medium.</p> <p>1: The proposal includes a basic transition plan but is missing three or more key components (e.g. rollback strategy, changeover strategy or testing procedures). Limited detail or documentation. Risk to service continuity is high.</p>	4		Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		0: The proposal lacks a transition plan or omits critical elements such as technical changes, changeover, testing, or rollback. No evidence of planning or risk mitigation.			

Table 3B: Technical Evaluation Criteria for Tower C, Category B

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion Evaluation				
1.1.	Direct Secure Redundant Links to Email Service Providers		20		

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.1.	<p>Infrastructure Architectural Diagram & Description. Show the following components on your diagram and provide a description of each of the components below:</p> <ul style="list-style-type: none"> IPSEC VPN Firewalls Encryption South Africa based data centres Redundancy Underlying carriers Single points of failure <p>SARS aims to establish the Bidder's current capability to deliver bulk email messages across secure links to email service providers.</p> <p>A Bidder must demonstrate that it is currently carrying bulk emails directly to all South African citizens.</p>	<p>3: The bidder has provided a high-level infrastructure architectural diagram that clearly shows the components (datacentres, servers, networks, security layers) of the mail solution proposed. It must show the links to each of the components mentioned below from IPSEC to Data centres. Each component must be described in as much details as necessary.</p> <p>2: As above for 3 but some (2 or less) components are not included in the diagram or descriptions of the components are insufficient</p> <p>1: As above for 2 but most (more than 2) components are not included in the diagram or descriptions of the components are insufficient.</p> <p>0: The bidder has not provided all the details required.</p>	20		Complete the Technical Response Template (TRT) & provide an Infrastructure Architectural Diagram & Description
2	Skills & experience				
2.1	Skills		10		
2.1 .1.	Account Manager - Technical account management skills (minimum of 3 years' project-management and ITSM experience and ITIL Foundation or COBIT 5 certification).	3: Resource has 3+ years' experience, relevant documentation is provided (CV) and holds ITIL Foundation or COBIT 5 certification. Demonstrates added value (e.g., advanced ITSM knowledge, leadership in similar projects).	4		Complete the Technical Response Template (TRT) and provide a CV

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects/assignments run from SARS's head office, or at SARS sites nationwide. A Bidder who can show sufficient coverage of all technical-skill categories available for such assignments will be eligible to achieve maximum points for this sub-criterion.	<p>2: Resource has at least 3 years' experience and relevant documentation is provided (CV) but lacks ITIL Foundation or COBIT 5 certification.</p> <p>1: Resource has some relevant experience but less than 3 years, or documentation is incomplete or unclear.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV, certifications) is provided.</p> <p>At least one (1) resource (may be subcontracted) with three (3) years' experience with relevant documentation (the Bidder must provide a Curriculum Vitae (CV) of the resource(s)).</p> <p>0: Resources with less than three (3) years' experience or with no relevant documentation.</p>			
2.1.2.	Technical Resources – Network engineer, Firewall, testing resource, communication solution design and MQ or architecture skills - minimum of 5 years' experience (it is permissible for one resource to cover different roles).	<p>3: Resources have 5+ years' experience with full documentation (CV) and demonstrate relevant experience.</p> <p>2: Resources have 3–4 years' experience with full documentation (CV, relevant experience).</p> <p>1: Resources have 3–4 years' experience, but documentation is incomplete or lacks clarity.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV) is provided.</p>	6		Complete the Technical Response Template (TRT) and provide a CV
3	Technical Solution Criterion				
3.1.	Bulk Email Service Capability		40		
3.1.1.	<p>High level application architectural diagram and detailed description provided</p> <p>SARS is seeking information to establish whether the Bidder has a fully developed and operational bulk email-message carrier solution which will</p>	3: The bidder has provided a application high level architectural diagram and clearly shows the components of the email solution proposed. It must show the links to each of the components mentioned below from direct links to Email Service Provider through to subcontractors.	20		Complete the Technical Response Template (TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	meet SARS's email-message-carrier service requirements. Bidders that propose a full solution with no single points of failure will receive maximum points for this criterion. The Bidder is expected to provide an architectural diagram specifying the components of the solution, including a published API specification. It must also include the protocol supported: Simple Mail Transfer Protocol (SMTP).	<p>2: The bidder has provided a high-level architectural diagram or shows the components of the email solution proposed.</p> <p>1: The bidder has provided some, but not all the items required</p> <p>0: The bidder has not provided a high-level architectural diagram and does not show the components of the email solution proposed.</p>			
3.1.2.	Patch Policy, Timelines & Communication	<p>3: The bidder has provided their Patch Deployment Policy, a timeline for the next year, and the communication protocol to be used to inform SARS in advance of any patches being deployed.</p> <p>2: The bidder has not specified one of the above components.</p> <p>1: The bidder has not specified more than one of the above components.</p> <p>0: The bidder has not provided any of the details required.</p>	5		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.3.	Bulk Email Delivery process	<p>3: The bidder has provided the Email Delivery process description, diagram clearly showing the sequence of events during delivery of an email from the SARS core system to the taxpayer and delivery confirmation back to SARS.</p> <p>2: One of the requirements have not been met</p> <p>1: More than on of the requirements have not been met</p> <p>0: The bidder has not provided any of the details required.</p>	5		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.4.	Email authentication protocols	<p>"3: The bidder has provided the details that shows the email authentication protocols (Sender Policy Framework (SPF), DomainKeys Identified Mail (DKIM), and Domain-based Message Authentication, Reporting & Conformance (DMARC)).</p> <p>2: The bidder has provided at least two details but not all of the email authentication protocols.</p>	5		Complete the Technical Response Template 5(TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		<p>1: The bidder has provided at most 2 of the email authentication protocols.</p> <p>0: The bidder has not provided any of the details required</p>			
3.1.5.	Access controls	<p>3: The bidder has provided the details that shows all the email access controls. (Access Control Models, Policies and Rules and Access Control Lists (ACLs)).</p> <p>2: The bidder has provided the details that shows the two email access controls.</p> <p>1: The bidder has provided the details that shows only one of the email access controls.</p> <p>0: The bidder has not provided any of the details required.</p>	5		Complete the Technical Response Template (TRT) and provide an Application Architecture
4	Service Management Solution Criterion				
4.1.	Service Management Maturity and Toolset Assessment		10		
4.1.1.	<p>Comprehensive maturity assessments and toolset capabilities for:</p> <ul style="list-style-type: none"> • Problem Management, • Incident Management • Service Request Management •Release Management •Change Management, • Event Management • Knowledge Management <p>SARS aims to ensure that the Bidder has both the necessary processes and tools to effectively manage and support all critical Service Management areas.</p>	<p>3: The bidder has provided comprehensive maturity assessments and toolset capabilities for all management areas.</p> <p>2: The bidder has provided maturity assessments and toolset capabilities with one or two missing requirements</p> <p>1: The bidder has provided maturity assessments and toolset capabilities with three or more missing requirements</p> <p>0: The bidder has not provided any of the required details for the management areas</p>	10		Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
4.2.	Bidder's Solution for Monitoring and Reporting (M&R) Portal		10		
4.2.1.	<p>Bidder's Solution for Monitoring and Reporting (M&R) Portal including:</p> <ul style="list-style-type: none"> • Infrastructure & Application, Architecture diagram & Description • Platform/ Access • Delivery method • Delivery Status Information • Near Real time monitoring • Ad Hoc reporting <p>SARS aims to assess the Bidder's solution for its effectiveness in achieving the specifications as set out in the Business Requirements Specification. A Bidder must provide a high-level infrastructure & application architectural diagram of its monitoring and reporting tool. The solution should contain functionality to deal with near real-time monitoring of all relevant aspects of the channel (SMS, USSD, short messages, shortened URL), including circuits to the MOs, capacity utilisation of critical elements, and queue status. Additionally, the service provider must provide up-to-date monthly statistics for all in-scope elements of the SMS carrier services over the term of the agreement, including traffic volumes, incidents and problems, and a breakdown of volumes per channel. A Bidder must provide monitoring tools to analyse the outbound transactions to detect unusual usage and ensure reconciliation of invoices to SARS data. Real-time (or near-real-time) with no longer than 10 minutes' delayed updating.</p>	<p>3: The bidder has provided a solution which fully meets all specified requirements.</p> <p>2: The Bidder has provided a solution with one or two missing requirements.</p> <p>1: The Bidder has provided a solution with three or more missing requirements.</p> <p>0: The bidder has not provided any of the required details for the M&R solution</p>	10		Complete the Technical Response Template (TRT)
5	Transition		10		
5.1	<p>Transition Team</p> <p>SARS aims to assess the Bidder's capability to transition the services effectively. All aspects of the transition team (team structure, escalation, key personnel, experience, & related qualifications) must be adequately explained by the Bidder's proposal, supported by relevant documentation (CV's) and it must present acceptable risk in achieving the requirements to score maximum points for this criterion. The key inquiry is: Does the</p>				

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	Bidder's proposal for transition include a formally defined transition team with these key roles Project manager, Network engineer, Firewall resource, Testing resource and MQ engineer? It is permissible for a resource to cover multiple roles.				
5.1.1.	Transition Team	<p>3: The proposal defines a transition team with named personnel covering All key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided.</p> <p>2: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided.</p> <p>1: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are NOT provided.</p> <p>0: The proposal lacks a formally defined transition team. No named personnel, roles, or supporting documentation (e.g. CVs) are NOT provided.</p>	6		Complete the Technical Response Template (TRT)
5.2.	Transition Plan SARS aims to assess the Bidder's proposal for transitioning the services effectively. All requirements for transitioning must be included in the scope of the project: <ul style="list-style-type: none"> Technical changes on SARS & Service Provider platforms – Ensure compatibility and readiness of both SARS and the new Service Provider 's platforms Changeover – Execute switch from the current Service Provider to the new one, and disengage the current provider 				
5.2.1.	Transition Plan	<p>3: The proposal includes all required elements: technical changes, changeover, testing, and rollback. Each component is described with sufficient detail and supported by documentation. Risk mitigated.</p> <p>2: The proposal includes a basic transition plan but is missing one or two key components (e.g. rollback strategy or testing procedures). Limited detail or documentation. Risk to service continuity is medium.</p>	4		Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		<p>1: The proposal includes a basic transition plan but is missing three or more key components (e.g. rollback strategy, changeover strategy or testing procedures). Limited detail or documentation. Risk to service continuity is high.</p> <p>0: The proposal lacks a transition plan or omits critical elements such as technical changes, changeover, testing, or rollback. No evidence of planning or risk mitigation.</p>			

Table 3C: Technical Evaluation Criteria for Tower C, Category C

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion Evaluation				
1.1.	Direct Links to between SARS and Service Provider to be created		20		

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.1.	<p>Infrastructure Architectural Diagram & Description. Show the following components on your diagram and provide a description of each of the components below:</p> <ul style="list-style-type: none"> • IPSEC • VPN • Firewalls • Encryption • South Africa based data centres • Redundancy • Underlying carriers • Single points of failure <p>SARS aims to establish the Bidder's current capability to deliver printed letters to taxpayers via SAPO.</p> <p>A Bidder must demonstrate that it is currently printing and distributing printed letters in South Africa.</p>	<p>3: The bidder has provided a high-level infrastructure architectural diagram that clearly shows the components (datacentres, servers, networks, security layers) of the mail solution proposed. It must show the links to each of the components mentioned below from IPSEC to Data centres. Each component must be described in as much details as necessary.</p> <p>2: As above for 3 but some (2 or less) components are not included in the diagram or descriptions of the components are insufficient</p> <p>1: As above for 2 but most (more than 2) components are not included in the diagram or descriptions of the components are insufficient.</p> <p>0: The bidder has not provided all the details required.</p>	20		Complete the Technical Response Template (TRT) & provide an Infrastructure Architectural Diagram & Description
2	Skills & experience				
2.1	Skills		10		

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
2.1 .1.	<p>Account Manager - Technical account management skills (minimum of 3 years' project-management and ITSM experience and ITIL Foundation or COBIT 5 certification).</p> <p>SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects/assignments run from SARS's head office, or at SARS sites nationwide. A Bidder who can show sufficient coverage of all technical-skill categories available for such assignments will be eligible to achieve maximum points for this sub-criterion.</p>	<p>3: Resource has 3+ years' experience, relevant documentation is provided (CV) and holds ITIL Foundation or COBIT 5 certification. Demonstrates added value (e.g., advanced ITSM knowledge, leadership in similar projects).</p> <p>2: Resource has at least 3 years' experience and relevant documentation is provided (CV) but lacks ITIL Foundation or COBIT 5 certification.</p> <p>1: Resource has some relevant experience but less than 3 years, or documentation is incomplete or unclear.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV, certifications) is provided.</p> <p>At least one (1) resource (may be subcontracted) with three (3) years' experience with relevant documentation (the Bidder must provide a Curriculum Vitae (CV) of the resource(s)).</p> <p>0: Resources with less than three (3) years' experience or with no relevant documentation.</p>	4		Complete the Technical Response Template (TRT) and provide a CV
2.1.2.	<p>Technical Resources – Network engineer, Firewall, testing resource, communication solution design and MQ or architecture skills - minimum of 5 years' experience (it is permissible for one resource to cover different roles).</p>	<p>3: Resources have 5+ years' experience with full documentation (CV) and demonstrate relevant experience.</p> <p>2: Resources have 3–4 years' experience with full documentation (CV, relevant experience).</p> <p>1: Resources have 3–4 years' experience, but documentation is incomplete or lacks clarity.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV) is provided.</p>	6		Complete the Technical Response Template (TRT) and provide a CV
3	Technical Solution Criterion				

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
3.1.	Printed Letters Solution		40		
3.1.1.	<p>High level application architectural diagram and detailed description provided</p> <p>SARS is seeking information to establish whether the Bidder has a developed printed letters solution that will meet SARS's printed letters-solution requirements. Bidders that propose a full solution with no single points of failure will receive maximum points for this criterion. The Bidder is expected to provide an architectural diagram specifying the components of the solution, including a published API specification. It must also include the protocol supported (MQ).</p>	<p>3: The bidder has provided a application high level architectural diagram and clearly shows the components of the printed letters solution proposed. It must show the links to each of the components mentioned below from direct links to Email Service Provider through to subcontractors.</p> <p>2: The bidder has provided a high-level architectural diagram or shows the components of the email solution proposed.</p> <p>1: The bidder has provided some, but not all the items required</p> <p>0: The bidder has not provided a high-level architectural diagram and does not show the components of the email solution proposed.</p>	20		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.2.	Patch Policy, Timelines & Communication	<p>3: The bidder has provided their Patch Deployment Policy, a timeline for the next year, and the communication protocol to be used to inform SARS in advance of any patches being deployed.</p> <p>2: The bidder has not specified one of the above components.</p> <p>1: The bidder has not specified more than one of the above components.</p> <p>0: The bidder has not provided any of the details required.</p>	5		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.3.	Printed Letter Delivery process	<p>3: The bidder has provided the Printed Letter Delivery process description, diagram clearly showing the sequence of events during delivery of an email from the SARS core system to the taxpayer and delivery confirmation back to SARS.</p> <p>2: One of the requirements have not been met</p> <p>1: More than one of the requirements have not been met</p> <p>0: The bidder has not provided any of the details required.</p>	15		Complete the Technical Response Template (TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
4	Service Management Solution Criterion				
4.1.	Service Management Maturity and Toolset Assessment		10		
4.1.1.	<p>Comprehensive maturity assessments and toolset capabilities for:</p> <ul style="list-style-type: none"> • Problem Management, • Incident Management • Service Request Management •Release Management •Change Management, • Event Management • Knowledge Management <p>SARS aims to ensure that the Bidder has both the necessary processes and tools to effectively manage and support all critical Service Management areas.</p>	<p>3: The bidder has provided comprehensive maturity assessments and toolset capabilities for all management areas.</p> <p>2: The bidder has provided maturity assessments and toolset capabilities with one or two missing requirements</p> <p>1: The bidder has provided maturity assessments and toolset capabilities with three or more missing requirements</p> <p>0: The bidder has not provided any of the required details for the management areas</p>	10		Complete the Technical Response Template (TRT)
4.2.	Bidder's Solution for Monitoring and Reporting (M&R) Portal		10		
4.2.1.	<p>Bidder's Solution for Monitoring and Reporting (M&R) Portal including:</p> <ul style="list-style-type: none"> • Infrastructure & Application, Architecture diagram & Description • Platform/ Access • Delivery method • Delivery Status Information • Near Real time monitoring • Ad Hoc reporting <p>SARS aims to assess the Bidder's solution for its effectiveness in achieving the specifications as set out in the Business Requirements Specification. A Bidder must provide a high-level infrastructure & application architectural</p>	<p>3: The bidder has provided a solution which fully meets all specified requirements.</p> <p>2: The Bidder has provided a solution with one or two missing requirements.</p> <p>1: The Bidder has provided a solution with three or more missing requirements.</p> <p>0: The bidder has not provided any of the required details for the M&R solution</p>	10		Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	<p>diagram of its monitoring and reporting tool. The solution should contain functionality to deal with near real-time monitoring of all relevant aspects of the channel (SMS, USSD, short messages, shortened URL), including circuits to the MOs, capacity utilisation of critical elements, and queue status. Additionally, the service provider must provide up-to-date monthly statistics for all in-scope elements of the SMS carrier services over the term of the agreement, including traffic volumes, incidents and problems, and a breakdown of volumes per channel. A Bidder must provide monitoring tools to analyse the outbound transactions to detect unusual usage and ensure reconciliation of invoices to SARS data. Real-time (or near-real-time) with no longer than 10 minutes' delayed updating.</p>				
5	Transition		10		
5.1	Transition Team SARS aims to assess the Bidder's capability to transition the services effectively. All aspects of the transition team (team structure, escalation, key personnel, experience, & related qualifications) must be adequately explained by the Bidder's proposal, supported by relevant documentation (CV's) and it must present acceptable risk in achieving the requirements to score maximum points for this criterion. The key inquiry is: Does the Bidder's proposal for transition include a formally defined transition team with these key roles Project manager, Network engineer, Firewall resource, Testing resource and MQ engineer? It is permissible for a resource to cover multiple roles.				
5.1.1.	Transition Team	<p>3: The proposal defines a transition team with named personnel covering All key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided.</p> <p>2: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided.</p> <p>1: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are NOT provided.</p>	6		Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		0: The proposal lacks a formally defined transition team. No named personnel, roles, or supporting documentation (e.g. CVs) are NOT provided.			
5.2.	Transition Plan SARS aims to assess the Bidder's proposal for transitioning the services effectively. All requirements for transitioning must be included in the scope of the project: <ul style="list-style-type: none"> Technical changes on SARS & Service Provider platforms – Ensure compatibility and readiness of both SARS and the new Service Provider 's platforms Changeover – Execute switch from the current Service Provider to the new one, and disengage the current provider 				
5.2.1.	Transition Plan	3: The proposal includes all required elements: technical changes, changeover, testing, and rollback. Each component is described with sufficient detail and supported by documentation. Risk mitigated. 2: The proposal includes a basic transition plan but is missing one or two key components (e.g. rollback strategy or testing procedures). Limited detail or documentation. Risk to service continuity is medium. 1: The proposal includes a basic transition plan but is missing three or more key components (e.g. rollback strategy, changeover strategy or testing procedures). Limited detail or documentation. Risk to service continuity is high. 0: The proposal lacks a transition plan or omits critical elements such as technical changes, changeover, testing, or rollback. No evidence of planning or risk mitigation.	4		Complete the Technical Response Template (TRT)

Table 3D: Technical Evaluation Criteria for Tower C, Category D

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion Evaluation				
1.1.	Direct links to Operators		20		
1.1.1.	<p>Infrastructure Architectural Diagram & Description. Show the following components on your diagram and provide a description of each of the components below:</p> <ul style="list-style-type: none"> • IPSEC • VPN • Firewalls • Encryption • South Africa based data centres • Redundancy • Underlying carriers • Single points of failure <p>SARS aims to establish the Bidder's current capability for delivering future social media, live chat, AI/LLM or similar services across secure to the "operator" (Meta/other).</p> <p>A Bidder must demonstrate that it is currently carrying the service traffic directly to the South African based entity interfacing into the "operator" (Meta/other).</p>	<p>3: The bidder has provided a high-level infrastructure architectural diagram that clearly shows the components (datacentres, servers, networks, security layers) of the mail solution proposed. It must show the links to each of the components mentioned below from IPSEC to Data centres. Each component must be described in as much details as necessary.</p> <p>2: As above for 3 but some (2 or less) components are not included in the diagram or descriptions of the components are insufficient</p> <p>1: As above for 2 but most (more than 2) components are not included in the diagram or descriptions of the components are insufficient.</p> <p>0: The bidder has not provided all the details required.</p>	20		Complete the Technical Response Template (TRT) & provide an Infrastructure Architectural Diagram & Description
2	Skills & experience				

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
2.1	Skills		10		
2.1.1.	<p>Account Manager - Technical account management skills (minimum of 3 years' project-management and ITSM experience and ITIL Foundation or COBIT 5 certification).</p> <p>SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects/assignments run from SARS's head office, or at SARS sites nationwide. A Bidder who can show sufficient coverage of all technical-skill categories available for such assignments will be eligible to achieve maximum points for this sub-criterion.</p>	<p>3: Resource has 3+ years' experience, relevant documentation is provided (CV) and holds ITIL Foundation or COBIT 5 certification. Demonstrates added value (e.g., advanced ITSM knowledge, leadership in similar projects).</p> <p>2: Resource has at least 3 years' experience and relevant documentation is provided (CV) but lacks ITIL Foundation or COBIT 5 certification.</p> <p>1: Resource has some relevant experience but less than 3 years, or documentation is incomplete or unclear.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV, certifications) is provided.</p>	4		Complete the Technical Response Template (TRT) and provide a CV
2.1.2.	<p>Technical Resources – Network engineer, Firewall, testing resource, communication solution design and MQ or architecture skills - minimum of 5 years' experience (it is permissible for one resource to cover different roles).</p>	<p>3: Resources have 5+ years' experience with full documentation (CV) and demonstrate relevant experience.</p> <p>2: Resources have 3–4 years' experience with full documentation (CV, relevant experience).</p> <p>1: Resources have 3–4 years' experience, but documentation is incomplete or lacks clarity.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV) is provided.</p>	6		Complete the Technical Response Template (TRT) and provide a CV
3	Technical Solution Criterion				
3.1.	Future Social Media channels, Live chat and AI/LLM Carrier Solution		40		
3.1.1.	<p>Application Architecture: Future channel Carrier Solution.</p>	<p>3: The bidder has provided a high-level application architecture diagram & detailed description of the full future channel carrying solution (social media, Live chat, AI/LLM) with links to the architecture diagram</p>	20		Complete the Technical Response Template (TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	SARS is seeking information to establish whether the Bidder has a developed message-carrier solution that will meet SARS's message-carrier service requirements. Bidders that propose a full solution with no single points of failure will receive maximum points for this criterion. The Bidder is expected to provide an architectural diagram specifying the components of the solution, including a published API specification. It must also include the protocol supported (SMPP, SOAP, REST).	<p>2: One component cannot be provided</p> <p>1: More than one component cannot be provided</p> <p>0: The bidder has not provided the diagram, or the descriptions of all components required.</p>			
3.1.2.	Patch Policy, Timelines & Communication	<p>3: The bidder has provided their Patch Deployment Policy, a timeline for the next year, and the communication protocol to be used to inform SARS in advance of any patches being deployed.</p> <p>2: The bidder has not specified one of the above components.</p> <p>1: The bidder has not specified more than one of the above components.</p> <p>0: The bidder has not provided any of the details required.</p>	5		Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.3.	Future requirement, social media, AI/Live chat Delivery process	<p>3: The bidder has provided the future requirement Delivery process description and diagram clearly showing the sequence of events during delivery of a future message from the SARS core system to the taxpayer's device and delivery confirmation back to SARS.</p> <p>2: One of the requirements have not been met</p> <p>1: More than one of the requirements have not been met</p> <p>0: The bidder has not provided any of the details required.</p>	10		
3.1.4.	Published API that supports SMPP, SOAP, Restful, SMTP	<p>3: The bidder has provided the published API specification that clearly shows that it supports SMPP, SOAP, REST and SMTP.</p> <p>2: One of the requirements have not been met</p> <p>1: More than one of the requirements have not been met</p>	5		Complete the Technical Response Template (TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		0: The bidder has not provided any the details required.			
4	Service Management Solution Criterion				
4.1.	Service Management Maturity and Toolset Assessment		10		
4.1.1.	<p>Comprehensive maturity assessments and toolset capabilities for:</p> <ul style="list-style-type: none"> • Problem Management, • Incident Management • Service Request Management •Release Management •Change Management, • Event Management • Knowledge Management <p>SARS aims to ensure that the Bidder has both the necessary processes and tools to effectively manage and support all critical Service Management areas.</p>	<p>3: The bidder has provided comprehensive maturity assessments and toolset capabilities for all management areas.</p> <p>2: The bidder has provided maturity assessments and toolset capabilities with one or two missing requirements</p> <p>1: The bidder has provided maturity assessments and toolset capabilities with three or more missing requirements</p> <p>0: The bidder has not provided any of the required details for the management areas</p>	10		Complete the Technical Response Template (TRT)
4.2.	Bidder's Solution for Monitoring and Reporting (M&R) Portal		10		
4.2.1.	<p>Bidder's Solution for Monitoring and Reporting (M&R) Portal including:</p> <ul style="list-style-type: none"> • Infrastructure & Application, Architecture diagram & Description • Platform/ Access • Delivery method • Delivery Status Information • Near Real time monitoring • Ad Hoc reporting <p>SARS aims to assess the Bidder's solution for its effectiveness in achieving the specifications as set out in the Business Requirements Specification. A</p>	<p>3: The bidder has provided a solution which fully meets all specified requirements.</p> <p>2: The Bidder has provided a solution with one or two missing requirements.</p> <p>1: The Bidder has provided a solution with three or more missing requirements.</p> <p>0: The bidder has not provided any of the required details for the M&R solution</p>	10		Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	Bidder must provide a high-level infrastructure & application architectural diagram of its monitoring and reporting tool. The solution should contain functionality to deal with near real-time monitoring of all relevant aspects of the channel (SMS, USSD, short messages, shortened URL), including circuits to the MOs, capacity utilisation of critical elements, and queue status. Additionally, the service provider must provide up-to-date monthly statistics for all in-scope elements of the SMS carrier services over the term of the agreement, including traffic volumes, incidents and problems, and a breakdown of volumes per channel. A Bidder must provide monitoring tools to analyse the outbound transactions to detect unusual usage and ensure reconciliation of invoices to SARS data. Real-time (or near-real-time) with no longer than 10 minutes' delayed updating.				
5	Transition		10		
5.1	Transition Team SARS aims to assess the Bidder's capability to transition the services effectively. All aspects of the transition team (team structure, escalation, key personnel, experience, & related qualifications) must be adequately explained by the Bidder's proposal, supported by relevant documentation (CV's) and it must present acceptable risk in achieving the requirements to score maximum points for this criterion. The key inquiry is: Does the Bidder's proposal for transition include a formally defined transition team with these key roles Project manager, Network engineer, Firewall resource, Testing resource and MQ engineer? It is permissible for a resource to cover multiple roles.				
5.1.1.	Transition Team	3: The proposal defines a transition team with named personnel covering All key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided. 2: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided. 1: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are NOT provided.	6		Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		0: The proposal lacks a formally defined transition team. No named personnel, roles, or supporting documentation (e.g. CVs) are NOT provided.			
5.2.	Transition Plan SARS aims to assess the Bidder’s proposal for transitioning the services effectively. All requirements for transitioning must be included in the scope of the project: <ul style="list-style-type: none"> Technical changes on SARS & Service Provider platforms – Ensure compatibility and readiness of both SARS and the new Service Provider ‘s platforms Changeover – Execute switch from the current Service Provider to the new one, and disengage the current provider 				
5.2.1.	Transition Plan	3: The proposal includes all required elements: technical changes, changeover, testing, and rollback. Each component is described with sufficient detail and supported by documentation. Risk mitigated. 2: The proposal includes a basic transition plan but is missing one or two key components (e.g. rollback strategy or testing procedures). Limited detail or documentation. Risk to service continuity is medium. 1: The proposal includes a basic transition plan but is missing three or more key components (e.g. rollback strategy, changeover strategy or testing procedures). Limited detail or documentation. Risk to service continuity is high. 0: The proposal lacks a transition plan or omits critical elements such as technical changes, changeover, testing, or rollback. No evidence of planning or risk mitigation.	4		Complete the Technical Response Template (TRT)

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