**SARS RFP 02-2024**

**Tower V**

**Voice Carrier Services**

**Technical Response Template**

***Instructions***

1. *The Bidder is instructed to follow the format (section numbering, headings etc.) of this Technical Response Template exactly. The Bidder must not deviate from the numbering scheme nor deviate from the order in which the sections and subsections are presented in this template.*
2. *Each section of this Technical Response Template corresponds to a Technical criterion in terms of which the Bidder’s Proposal will be evaluated. Within each section is an explanation (in italics) of what the Bidder is required to provide. Omitting a section, a required response, answer, or required documentation will result in SARS not being able to allocate points to the Bidder for that criterion.*
3. *The response to each section of this Technical Response Template must be separated by a file divider in the Bidder’s hardcopy response.*
4. *The Bidder must attach documentary evidence of claims where specifically requested and, where directed, may attach additional documentation. All documentation must be placed in a subsection of Section 6 (Additional Documentation) located at the end of this template and a reference to the documentation must be made by the Bidder in the “Response Table B: References to Additional Documentation” of the referring section. SARS is not under any obligation to evaluate material that is not referenced within “Response Table B: References to Additional Documentation” and in the manner set out above.*
5. *The Bidder must use this MS-Word document as a template for its response. The Bidder may delete these italicised instructions and the tables headed by “Instructions for completing a Response to Table A” and “Instructions for completing a Response to Table B” from the completed template in its Proposal.*

***Important note regarding the contents of the Bidder’s response***

1. *The accuracy of content of the Bidder’s response is paramount. SARS may, at its discretion, conduct a due diligence to verify the claims made in the Bidder’s Proposal during or after SARS’s evaluation of the technical criteria. The Bidder is advised to note the provision of the RFP with regard to misrepresentation, and disqualification in the RFP Main Document*.
2. *Unless otherwise specified, where responses are required to indicate Bidder’s capability, the Bidder’s current capabilities must be given.*
3. *The Bidder must make clear every aspect of its response to the information sought. SARS does not take any responsibility to clarify any aspect of the Bidder’s response. SARS may at its own discretion seek clarification from the Bidder. Any interpretation that is made by SARS evaluators of an ambiguous response will be final and need not be clarified by SARS.*
4. *SARS will evaluate the Bidder’s Proposal based on the information contained in the Proposal (and any clarifications, verifications, or due diligence conducted by SARS). SARS has no responsibility to take extraneous information into account in its evaluation.*
5. *If the Bidder is successful, the Bidder’s Proposal will be included as Schedule G to the contract (for details see the terms of the Network Carrier and Infrastructure Services Agreement. Features, functions, and capabilities included in the Bidder’s Proposal may, at SARS’s discretion, be included as additional terms in the Voice Carrier Services Statement of Work (Schedule B-V of the Network Carrier and Infrastructure Services Agreement).*

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**Technical Response**

**[Bidder Name]**

1. Proposal scope

|  |  |
| --- | --- |
| **Scope within Tower V** | **Yes/No** |
| Preferred Inbound Voice Carrier Provider |  |
| Preferred Outbound Voice Carrier Provider |  |

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| ***Instructions and notes on evaluation*** | | |
| *The Bidder must complete the above table in full.* | | |
| ***Field name*** | ***Instructions*** | |
| *Scope within Tower V* | *The area of scope within Tower V for which the Bidder is submitting a proposal.* | |
| *Yes/No* | *The Bidder must respond with either “Yes” or “No” to indicate whether or not it is submitting a Proposal for the corresponding scope. The Bidder must refer to the Business Requirements Specification for a full description of the areas of scope within this Tower. An answer other than “Yes” or “No” will be taken by SARS as “No”*  *The Bidder may submit a Proposal in Tower V for one, two, or all areas of scope within Tower V.*  *If the Bidder has responded “Yes” to:* | |
| Preferred Inbound Voice Carrier Provider | *Then the Bidder must complete all sections of this document except Section 2.4.* |
| *Preferred Outbound Voice Carrier Provider:* | *Then the Bidder must complete all sections of this document, except sections 2.3.* |

* 1. Current Client Base

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| *The Bidder must set out in the table below the clients to which it is currently delivering services that fall within the scope of this Tower and must describe the nature and scope of the services.*  *SARS aims to establish the current capability of delivering services within the scope of this Tower. Bidders who can show that they are currently delivering services within the scope of this Tower to an established client base of sufficient scale will achieve maximum points. Documentation, such as letters of reference from the clients substantiating the Bidder’s claims, must be attached to achieve maximum points.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* * *The Bidder should list as many clients as is necessary to show that all elements of the scope of this Tower are being delivered by the Bidder to clients. The Bidder should list as many clients as is necessary to show the scale of its current delivery is at least equivalent to that required for the delivery of services in this Tower* * *The Bidder may add more lines to Response Table A if necessary to provide details of all its clients.* | | |
|  | **Field name** | ***Instructions*** |
| *Client Name* | *The Bidder must supply the full name of the current client of the Bidder.*  *The Bidder cannot use the client of a subcontractor as a reference; the client must have a current contract with the Bidder for the services.*  *SARS is seeking only the names of clients to whom the Bidder delivers services within the borders of South Africa.* |
| *Scope of Services Rendered* | *The Bidder must describe in full the services that the Bidder renders to the client. The Bidder must show that the scope of services delivered to the client is relevant to the Tower V services set out in the Business Requirements Specification.*  *If the services described are in any way delivered with a subcontractor or third party, this must be fully disclosed.* |
| *Years of Delivery* | *The Bidder must supply the dates of delivery e.g. “2010–present”.* |
| *Scale of Delivery* | *The Bidder must describe how the services delivered to the client relate to the Services set out in the Business Requirements Specification and how the size and scope of the services delivered to the client relate to the size and scope of services requested by SARS in this Tower.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Letter of reference”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Letter of reference confirming the contract for the scope of services”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** | | | |
| **Current Client Base** | | | |
| **Client Name** | **Scope of Services Rendered** | **Years of Delivery** | **Scale of Delivery** |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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* 1. Subcontractor/Underlying Carrier

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| *The Bidder must set out, in Table A below, the relationships with subcontractors/underlying carriers that the Bidder will rely upon to provide the services within the scope of this Tower.*  *SARS seeks to establish the extent to which the Bidder places reliance on third parties generally to deliver the services, the formality with which third parties have been engaged for the Bidder’s Proposal and the track record of the Bidder working together with the particular third parties. Bidders who can show that the level of reliance on third parties and the formality with which it has engaged such third parties as subcontractors does not pose a risk to the delivery of services to SARS will achieve maximum points for this criterion. Documentation must be attached by the Bidder to substantiate its claims to achieve maximum points.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* * *All subcontractors intended to be contracted by the Bidder, must be listed.* * *The Bidder may add more lines to Response Table A if necessary to provide details of all intended subcontractors.* | | |
|  | **Field name** | ***Instructions*** |
| *Subcontractor/Underlying Carrier Provider Name* | *The Bidder must supply the full name of the subcontractor/underlying carrier provider upon whom it is relying on to provide the service.* |
| *Scope of services to be delivered* | *The Bidder must describe, in full, the scope of services that the subcontractor/underlying carrier provider will be providing in the Bidder’s Proposal.* |
| *Contract with Bidder* | *The Bidder must indicate whether the Bidder has a contract with the subcontractor/underlying carrier provider and must indicate whether it is a formal contract and when the contract was entered into.* |
| *Subcontract Contract Value*  *Percentage* | *The Bidder must indicate what the value of services proposed to be subcontracted to the subcontractor/underlying carrier is as a percentage of the estimated contract value of the scope of services in this Tower.* |
| *Details* | *The Bidder must describe any other pertinent details of the nature of the contract.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “MOU”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of subcontractor agreement with [subcontractor name]”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** | | | | |
| **Subcontractor/Underlying Carrier** | | | | |
| **Subcontractor/Underlying Carrier Provider Name** | **Scope of Services to Be Delivered** | **Contract with Bidder** | **Subcontract Contract Value**  **Percentage** | **Details** |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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* 1. Bidder’s strategic direction

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| *The Bidder must set out, in Table A below, its commitment to supplying services based on the technologies listed into the future.*  *SARS seeks to establish the extent to which the Bidder has a commitment to providing services based on each of the technologies listed. The Bidder’s strategic direction with regard to developing new technologies and replacing older technologies must inform SARS of enhancements to the services within this Tower. Documentation should be attached by the Bidder to support any claims made.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *Technology and services as listed in table* | *The Bidder should describe its commitment to the provision of the technology, enhancements, migration to newer technologies, opportunities newer technologies may bring, cost savings, and any other information that will show opportunity for the reduction in risk.*  *The evaluation of this criterion will be improved by the provision of committed timelines or other specific rollout dates of projects and/or strategic initiatives and investment spend that the Bidder is/will be making that will occur during the intended Term.*  *The Bidder may include the strategic direction of a third party if the Bidder is reselling or subcontracting such area of scope. The Bidder must make it clear which of its response is made in terms of a third party’s strategy and which is made of its own direction. The third party/underlying carrier provider must be named in the table in Section 3 above.* |
| *Innovation* | *The Bidder should describe the Bidder’s commitment to innovation in its service offerings to find solutions to customer business problems. The Bidder should include any case studies that may be relevant to the scope of services in this Tower.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Strategy document”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of occupation of premises”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** |
| **Bidder’s Strategic Direction** |
| **Strategic direction per carrier technology/service area** |
|  |
| **SIP Services Provision** |
|  |
| **Wireless Voice Services** |
|  |
| **PABX Provision** |
|  |
| **Hosted Voice Services** |
|  |
| **Service Management** |
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| **Innovation** |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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* 1. PRESENCE and coverage — Service Centres/Offices

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| *The Bidder must set out in the table below the locations of Service Centres from which technical staff will be deployed to provide services. The Bidder must provide the number of staff currently operating from the Service Centres in the categories defined. Where a Service Centre is intended to be set up only if the Bidder is successful, this can be included in the table, provided it is clearly indicated as such in the column provided.*  *SARS aims to establish the depth of skills and capabilities that the Bidder (and its subcontractors) will be able to bring to bear in delivering services to SARS. Bidders who can show that its existing Service Centres have sufficient coverage of required skills will achieve maximum points. The extent to which Service Centres that are not yet established are relied upon to provide distribution of skills will be taken into consideration.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* * *All service centres intended to be used by the Bidder in the delivery of services must be listed.* * *The Bidder may add more lines to Response Table A if necessary to provide details of all intended service centres.* | | |
|  | **Field name** | ***Instructions*** |
| *Service Centre/Office* | *The Bidder must supply the names of the Service Centre/Office in South Africa. The Bidder must add as many lines in the table as are necessary set out the Bidder’s service centres* |
| *Address* | *The Bidder must supply the address of the Service Centre/Office.* |
| *Number of Staff* | *The Bidder must supply the number of staff who deliver services from the Service Centre/Office.*  *The Bidder must express the number of staff at the service centre into Management/Technical /Administrative as shown in the header.* |
| *Description of Office/ Capability* | *The Bidder should describe the office (e.g. Service Centre/Branch Office/Head Office etc.)* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Utilities bill”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of occupation of premises”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** | | | | | |
| **Presence and Coverage – Service Centres/Offices** | | | | | |
| **Service Centre/Office** | **Address** | **Number of staff** | | | **Description of Office/Capability** |
| **Management** | **Technical** | **Admin** |  |
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| **Response Table B: References to Additional Documentation** | | |
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* 1. Skills

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| *The Bidder must set out in the table below the number of the Bidder’s (including its subcontractors) personnel that will be available to SARS for specialist engagements on a Project or Time and Materials basis. The numbers of personnel provided by the Bidder must be available for projects/assignments that will be co-ordinated and run from SARS head office in Pretoria.*  *SARS aims to establish the depth of skills that the Bidder (including its subcontractors) will be able to 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 skills categories available for such assignments will be eligible for maximum points for this sub-criterion.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *OEM Certifications* | *The Bidder must supply the OEM certifications relevant to the technologies it is proposing.* |
| *Voice Network Qualification /Certification* | *The Bidder must supply the certifications/qualifications relevant to network design and architecture of the skills it is proposing.* |
| *Project Management Qualification* | *The Bidder must supply the project management qualifications of the skills it is proposing.* |
| *Number of staff* | *The Bidder must supply the number of staff it has access to with the corresponding certifications/qualifications.* |
| *Subcontractor name* | *The Bidder must supply the name of the subcontractor (which has been named as a subcontractor in table 2 above) through which it has access to skills with the corresponding certification.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Summary of CVs”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document shows details of personnel listed”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** |
| **Skills** |

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| --- | --- | --- |
| **Voice-related OEM Certifications (Bidder’s Employees)** | | |
| **OEM Certifications** | | **Number of staff** |
|  | |  |
|  | |  |
|  | |  |
| **Voice-related OEM Certifications (Bidder will have access to via Subcontractors)** | | |
| **OEM Certifications** | **Subcontractor name** | **Number of staff** |
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| **Voice Network Design And Architecture Skills (Bidder’s Employees)** | | |
| **Voice Network Qualification/Certification** | | **Number of staff** |
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| **Voice Network Design And Architecture Skills (Bidder will have access to via Subcontractors)** | | |
| **Voice Network Qualification/Certification** | **Subcontractor name** | **Number of staff** |
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| **Project Management Skills (Bidder’s Employees)** | | |
| **Project Management Qualification/Certification** | | **Number of staff** |
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| **Project Management Skills (Bidder will have access to via Subcontractors)** | | |
| **Project Management Qualification/Certification** | **Subcontractor name** | **Number of staff** |
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| **Response Table B: References to Additional Documentation** | | |
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1. Bidder Voice Network

2.1. Bidder VOICE Points of Presence

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| *The Bidder must set out in the table the current and planned Voice points of presence that it intends to use to deliver the Tower V Voice services.*  *SARS aims to establish the Bidder’s current distribution of Voice POPs, both current and planned to be used for the delivery of SARS voice services. Bidders with currently established voice locations and those planned in close proximity to the SARS Sites (Alberton and Doringkloof) will score maximum points for this sub-criterion.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *Point of Presence* | *The Bidder must supply the name of the Point of Presence (POP). The Bidder must use this name in referencing this Point of Presence in other tables in the Bidder’s Proposal* |
| *Existing* | *The Bidder must supply details of whether the POP currently exists. If the POP is still to be established, the Bidder must provide details of the date it will be commissioned.* |
| *Proposed* | *The Bidder must indicate whether this POP is being proposed in its Proposal. (The Bidder may supply details of its POP that are not used in its Proposal to SARS.)* |
| *Full Address* | *The Bidder must supply the full address details of the POP.* |
|  |  |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Configuration diagram”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document shows the configuration of xxxx”). Document should show % of POP’s* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| --- | --- | --- | --- | --- |
| **Response Table A** | | | | |
| **Voice Points of presence** | | | | |
| **Point of Presence** | **Existing** | **Proposed** | **Full Address** | **Details of POP location** |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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2.2. Interconnects to other Voice operators

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| *The Bidder must set out details of its interconnects with other voice network operators*  *SARS aims to establish the Bidders capability in delivering a complete voice solution to subscribers of all voice networks. Bidders who can show they have direct interconnect agreements with all local voice providers will score maximum points for this criterion.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *Voice Operator* | *The Bidder must supply the names of all voice operators with whom it maintains interconnects with contracts.* |
| *Interconnect location* | *The Bidder must supply details of the interconnect location.* |
| *Capacity* | *The Bidder must supply details of the available capacity of the interconnect* |
| *Description* | *The Bidder must supply any other details regarding the interconnects which SARS should take into account in evaluating the Bidder’s Proposal. The* *Bidder must be able to provide proof of an agreement between the Bidder and the major voice providers (Vodacom and MTN).* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Agreement summary”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of agreement”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** | | | |
| **Interconnects To Other Voice Operators** | | | |
| **Voice Operator** | **Interconnect Location** | **Capacity** | **Description** |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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* 1. Preferred inbound Voice Carrier Solution

(Preferred inbound Voice Carrier Bidders ONLY)

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| *SARS is seeking information to establish whether the Bidder has developed and can provide an inbound solution for voice communications from the SARS sites listed in Response Table A below. The Bidder must refer to the Business Requirements Specification for details of the requirements (e.g. SIP requirements, etc.).*  *The Bidder must include in in its description of its solution at each site how it will retain the number ranges for inbound calls as specified in the Business Requirements Specification.*  *It is the Bidder’s responsibility to provide as much information as it can to support its claim to having developed a complete solution.*  *The Bidder will be evaluated on the following basis:*   1. *The Bidder has shown an understanding of SARS’s requirements.* 2. *The information set out meets the requirements.* 3. *The Bidder’s solution will meet or exceed SARS’s requirements for connectivity.* 4. *The Bidder’s solution represents a low risk to the take-on and on-going delivery of these Services.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *SARS Site* | *SARS requires the solution to be implemented at Alberton and Doringkloof.* |
| *Solution* | 1. The Bidder has proposed a complete Inbound SIP Trunk solution that covers 100% of the solution with geographical redundancy options. Geographical redundancy means that the VoIP solution will connect to both ALB and DRK. This will offer geo-redundancy to SARS Test- and Production Sites, with a VoIP Platform for automatic failover should a site-specific SIP Instance fail, and vice versa. Currently, the design is an “Active-Active” fully geo-redundant system. The Preferred Inbound Voice Carrier provider must provide a SIP Trunking solution for break-in and -out at Alberton campus, Brooklyn (Pretoria), and Doringkloof offices. This must support G.729 Codecs, G2, G3, and G4 Fax (T.38); direct dialling inward; direct dialling outward; caller-line identification presentation; caller-line identification restriction; call forward; and number barring. The SIP Trunk solution must be fully redundant with 24/7 support. Minimum concurrent SIP sessions should be 1 860 per site to support G.729. Please refer to the BRS for the full requirement. |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Utilities bill”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of occupation of premises”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| --- | --- |
| **Response Table A** | |
| **Preferred Outbound Voice Carrier Solution** | |
| **Transition Project Team Structure** | |
| **SARS Site** | **Solution** |
| Alberton |  |
| Doringkloof |  |
| Brooklyn HQ |  |

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| --- | --- | --- |
| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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* 1. Preferred outbound Voice Carrier Solution

(Preferred OUtbound Voice Carrier Bidders ONLY)

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| --- | --- | --- |
| *SARS is seeking information to establish whether the Bidder has developed and can provide an outbound solution for voice communications from the SARS sites listed in Response Table A below. The Bidder must refer to the Business Requirements Specification for details of the requirements (e.g. SIP requirements, etc.).*  *The Bidder must include in in its description of its solution at each site how it will retain the number ranges for outbound calls as specified in the Business Requirements Specification.*  *It is the Bidder’s responsibility to provide as much information as it can to support its claim to having developed a complete solution.*  *The Bidder will be evaluated on the following basis:*   1. *The Bidder has shown an understanding of SARS’s requirements.* 2. *The information set out meets the requirements.* 3. *The Bidder’s solution will meet or exceed SARS’s requirements for connectivity.* 4. *The Bidder’s solution represents a low risk to the take-on and on-going delivery of these Services.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *SARS Site* | *SARS requires the solution to be implemented at Alberton and Doringkloof and Brooklyn* |
| *Solution* | *The Bidder must supply details of the technology and design of the solution at each site listed in the SARS Site field for outbound calls. The Bidder must provide details of the SIP connectivity from the SARS sites and details of calls that are carried to each terminating operator. Volumes of concurrent calls that will be able to be carried by the Bidder in its solution must be specified.* The Bidder needs to provide statistical data that its network can accommodate more than 35,000 Outbound calls a day, which must be routed directly to the cellular network providers network via Interconnection links with a Call quality MoS Value of not less than 3.8. All outbound traffic must be routed via dedicated Voice Links. The requirement is that all SARS offices will make use of outbound calls. All voice links must be fully redundant with a secondary link in place. The call routing must be based on least cost routing. |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Utilities bill”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of occupation of premises”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

|  |  |
| --- | --- |
| **Response Table A** | |
| **Preferred Outbound Voice Carrier Solution** | |
| **Transition Project Team Structure** | |
| **SARS Site** | **Solution** |
| Alberton |  |
| Doringkloof |  |
| Brooklyn |  |

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| --- | --- | --- |
| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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1. Service Management SOLUTION

3.1 SERVICE MANAGEMENT Compliance/Conformance

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| *The Bidder must set out in the table below the maturity of its own organisational service management processes.*  *SARS aims to establish that the bidder follows a service management framework and that the Bidder has implemented a set of well-defined practices and processes for IT services management, to demonstrate their commitment to delivering high quality IT services and continuously improving their service management processes in line with SARS’s requirements.*  *The Bidder will be evaluated on the following basis:*   * *The Bidder that has provided evidence of its* ***ISO 20000 certification******OR*** *has provided a formal IT Service Management Maturity Assessment report indicating an overall* ***Maturity score of 4*** *or higher will attain the maximum score.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| Service Management Process | *Name of the process (given)* |
| Compliance/Conformance | *The Bidder has to indicate that their organisation adheres to a best practice Service Management framework/standard and has provided one of the following as evidence: A valid ISO 20000 certificate OR a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of* ***4 (four)*** *(quantitively managed or equivalent) or higher.*  *Bidders that provide a Maturity Assessment report as evidence, must adhere to the following requirements:*   * *The Service Management Maturity Assessment must be based on the COBIT or ITIL Framework* * *The report must be produced by an accredited independent assessor/auditor. The letter confirming the accreditation of independent assessor/auditor must be provided* * *The report must be signed by the bidder’s CFO and CEO or equivalent management structure.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is expected to attach any additional documentation to substantiate claims made in its answer(s) in Table A, for example, reports, assessment findings etc. It remains the Bidder’s responsibility to provide sufficient information to support its claims to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Service management assessment”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of service management maturity”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Service Management Compliance/Conformance** | |
| **Response Table A** | |
| **Service Management Process** | **ISO 20000 Certificate/Maturity assessment** |
| **Service Management Framework** |  |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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3.2 SERVICE MANAGEMENT TOOLSET

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| *The Bidder must set out in the table below a description of the toolset that the Bidder has implemented for service management.*  *SARS aims to establish the level of automation of the Bidder’s service management process as a foundational element to the successful provision of IT services as stipulated in the Business Requirement Specification.*  *The Bidder who can give verifiable references to confirm that the toolset used offers enough automation of its service management according to SARS’ requirements will get full points for this sub-criterion.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| Functionality | *Name of the process (given)* |
| Description/dimensions | *The Bidder must provide details of:*   * *Two contactable references of a fully implemented automated toolset/system* * *The automated system/toolset/product used in the following domains:*   + Incidents Management.   + Problems Management.   + Change Management.   + Configuration Management.   + Service Level Management.   + Performance and Capacity Management.   + Service management Reporting. * *Number of years it has been in use by the Bidder for this function* * *Number of users* * *Bidder’s commitment to the system/product for the corresponding service management processes* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is expected to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claims to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Service management product specification”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides detail of the product that is in use”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Service Management Toolset** | |
| **Response Table A** | |
| **SERVICE MANAGEMENT TOOLSET** | |
| **Description** | **Information/References** |
| **Two contactable references of a fully implemented automated toolset/system** |  |
| **The system/toolset/product used in the following domains:**   * **Incidents Management** * **Problems Management** * **Change Management** * **Configuration Management** * **Service Level Management** * **Performance and Capacity management** * **Service Management Reporting** |  |
| **Number of years** |  |
| **Number of users** |  |
| **Bidder’s commitment** |  |

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| --- | --- | --- |
| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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3.3. MONITORING and Reporting Portal

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| *The Bidder must provide details of its proposed solution to meet SARS’s requirements for a Monitoring and Reporting Portal. The description of the Bidder’s solution at the minimum must:*   * *Address all required elements of the solution as set out in paragraph 7.4.8 of the Business Requirements Specification.* * *Address the detailed functionality/transactions requirement as set out in the Response Table A.*   *SARS aims to assess the Bidder’s solution for effectiveness in achieving the specifications as set out in the Business Requirements Specification. A solution which adequately addresses all aspects of the requirements listed above and which presents little or no risk to SARS in the delivery of the solution will score maximum points for this criterion.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* * *All subcontractors intended to be contracted by the Bidder, must be listed.* * *The Bidder may add more lines to Response Table A if necessary to provide details of all intended subcontractors.* | | |
|  | **Field name** | ***Instructions*** |
| *Description* | *The Bidder must provide a description of its solution to SARS’s requirement for a Monitoring and Reporting Portal. The Bidder may make reference to other documents, diagrams, screenshots and tables in its Proposal. The Bidder must clearly reference such documentation in the description.* |
| *Platform/Access* | *The Bidder must describe the delivery platform, and how SARS will access the Monitoring and Reporting Portal including the security features.* |
| *Delivery* | *The Bidder must supply details of the current state of solution to SARS Monitoring and Reporting requirement. The Bidder must include details of the current state; whether it is currently delivered to customers; whether development is required to meet SARS’s requirements, etc. and, if so, provide a project plan/timeline.*  *The Bidder must also provide details of its integration with underlying carrier/subcontractor provider systems for monitoring.* |
| *Requirement* | *The requirement is listed below the header. The Bidder must reference the Business Requirement Specification for more details of the requirement.* |
| *Status/Information* | *The status/information required by SARS.* |
| *Component* | *The specific component of the network to which the requirement is referring.* |
| *Compliance* | *The Bidder must indicate the compliance of its solution to the requirement. The Bidder must state “Comply”; “Do not Comply”; or “Partially Comply”.* |
| *Exclusions/Limitation* | *The Bidder must list all limitations or exclusions of its solution to the requirement so that SARS can determine the extent of the Bidder’s compliance to the requirement. The Bidder must indicate in this column whether this particular requirement is delivered as part of its current capability or whether it will have to be developed during transition.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the* *Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Functionality map”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides an overview of the functionality in the portal”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

| **Response Table A** | | | | |
| --- | --- | --- | --- | --- |
| **Monitoring and Reporting Portal** | | | | |
| **Description** | | | | |
|  | | | | |
| **Platform/access** | | | | |
|  | | | | |
| **Delivery** | | | | |
|  | | | | |
| **Requirement** | **Status/Information** | **Component** | **Compliance** | **Exclusions/Limitations** |
| Real-time (or near real time with no longer than 10 (ten) minutes delayed updating) | Up/Down Availability Status | Access circuits |  |  |
|  |  |
| Capacity Utilisation | Access circuits |  |  |
| Access circuits |  |  |
| Error Rates |  |  |  |
| Access circuits |  |  |
| IP Traffic Flow |  |  |  |
| Access circuits |  |  |
| Accumulated statistics (near real time updates with no longer than 10 minutes’ delayed updating) | Availability % |  |  |  |
| Access circuits |  |  |
| Capacity Utilisation |  |  |  |
| Access circuits |  |  |
| Error Rates |  |  |  |
| Access circuits |  |  |
| IP Traffic Flow |  |  |  |
| Access circuits |  |  |
| Reports of all outages |  |  |  |  |
| Reports of all events not repaired with the Service Levels |  |  |  |  |
| Problem trends |  |  |  |  |
| Utilisation trends |  |  |  |  |
| Records of actions identified |  |  |  |  |
| Inventory Report |  |  |  |  |
| Report Filtering |  |  |  |  |
| Report emailing |  |  |  |  |
| SMS notifications |  |  |  |  |
| Reports of all outages |  |  |  |  |
| Reports of all events not repaired with the Service Levels |  |  |  |  |
| Problem trends |  |  |  |  |

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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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1. Transition
   1. TRANSITION TEAM structure and experience

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| *The Bidder must provide details of its proposed transition team*   * *Nature of the transition* * *Project outcome, time taken* * *Experience of team members* * *Structure and reporting line into the Bidder’s organisation*   *SARS aims to assess the Bidder’s capability to transition the services effectively. All aspects of the transition team listed above must be adequately addressed by the Bidder’s proposal to present acceptable risk to the achievement of 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 named and experienced key resources?* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.*  |  |  | | --- | --- | | **Field name** | ***Instructions*** | | Customer Name | *Customer for whom the Transition was undertaken* | | Services taken on | The nature of the services being taken on | | Service Management Integration | Details of what level of system management integration was performed and how this was achieved. | | Transition Project Details | Provide as much relevant detail as possible to establish the Bidder’s Transitioning experience. Relevant factors would include:   * Complexity of the transition * Time taken * Size of Transition team | | | |
|  | **Field name** | ***Instructions*** |
| Transition team | The Bidder must provide details of its proposed transition team   * Proof of transitioning two clients similar in size to SARS * Structure of the team and reporting line into the Bidder’s organisation * Provide list of roles within the team * Experience of team members |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is expected to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claims to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Transition team structure”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document sets out the team structure graphically”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Transition Experience** | | | |
| **Response Table A** | | | |
| **Customer name** | **Services taken on** | **Service Management Integration** | **Transition Project Details** |
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| **Transition Team** |
| **Response Table A** |
| **Transition Team** |
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|  |
| --- |
| **Description** |
|  |
| **Individual Experience** |
|  |
| **Different Roles in Transition Team** |
|  |

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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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* 1. TRANSITION PLAN

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| *The Bidder must provide details of its proposed transition of this Tower’s services including a Gantt chart of activities, showing milestones, resourcing and timing of each activity.*  *SARS aims to assess the Bidder’s proposal for transitioning the services effectively. All requirements for Transitioning in the Business Requirements Specification, the Agreement, and the RFP Main Document must be included in the scope of the project, including the plan to meet the required timelines.*  *The key inquiry is: Does the Bidder’s proposal for a transition plan contain all the elements for a transition project that will achieve a successful transition* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| Transition Plan | The Bidder must provide a project plan down to activity level that shows how the requirements for Transition in the *Business Requirements Specification*, the *Agreement*, and the *RFP Main Document will be met, including meeting the required timelines.*  *The plan must include a Gantt chart of activities, resources assigned and timelines associated with each activity. The details of each activity should be given in a separate document.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is expected to attach additional documentation to provide sufficient documentation relating to the activities that comprise its Transition Plan. It remains the Bidder’s responsibility to provide sufficient information for SARS to understand the Bidder’s approach and level of planning fully.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Project Plan Gantt chart”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides a Gantt chart overview of the project activities”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Transition Plan** |
| **Response Table A** |
| **Transition Plan** |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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**Risk Management**

* 1. Security Organisational Management Structure

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| *SARS aims to establish the Bidder’s organisational approach to security management as defined within the ISO 27001 framework and with specific reference to an implemented ISMS.*  *The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of the Services in this Tower.*    *The Bidder will be evaluated formally on the following basis:*  *SARS seeks to establish the extent to which the Bidder has an approved and well-appointed organisational HR structure with specific reference to Information Security and Risk management.*  *Bidders who have a single point of accountability regarding Information Security (formal appointed CISO/ISO or equivalent) will achieve maximum points for this criterion.*  *The evidence needs to be provided by the Bidder’s duly appointed Auditor and the compliance letter needs to indicate all ISMS requirements as stipulated in the ISO 27001 framework* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *Organisational security strategy* | *The Bidder must provide it current strategy on how security is managed within the organisation. For example, does the Bidder have a dedicated security manager; information; physical; security awareness etc.* |
| *Standards and policies* | *The Bidder must describe what best practices and standards are followed to implement security (e.g. ISO27001/2; ISO 17799 etc.)*  *The Bidder must demonstrate security policy implementation (e.g. formal policies; standards; procedures) and how they are enforced within the Bidder’s organisation.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “ISO Certificate”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of ISO certification* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** |
| **Organisational Security** |
| **HR Organisation Structure (Information Security & Risk Management)** |
|  |
| **Information Security Policies and Procedures** |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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* 1. Security Organisational Management policy

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| *SARS aims to establish the Bidder’s organisational approach to security management as defined within the ISO 27001 framework and with specific reference to an implemented ISMS.*  *The Bidder must give as much information as possible to explain its security approach and how it will benefit SARS in the delivery of the Services in this Tower.*    *The Bidder will be evaluated formally on the following basis:*  *The Bidder has shown its implemented ISM capability with specific reference to organisational strategy and approved Information Security Policies and Procedures (Structure) that are in line with industry standards and which have been formalised within its organisation.*  *The evidence needs to be provided by the Bidder’s duly appointed Auditor and the compliance letter needs to indicate all ISMS requirements as it relates to Information Security Policies and Procedures as stipulated in the ISO 27001 framework.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *Organisational security strategy* | *The Bidder must provide it current strategy on how security is managed within the organisation. For example, does the Bidder have a dedicated security manager; information; physical; security awareness etc.* |
| *Standards and policies* | *The Bidder must describe what best practices and standards are followed to implement security (e.g. ISO27001/2; ISO 17799 etc.)*  *The Bidder must demonstrate security policy implementation (e.g. formal policies; standards; procedures) and how they are enforced within the Bidder’s organisation.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “ISO Certificate”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides proof of ISO certification* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** |
| **Organisational Security** |
| **HR Organisation Structure (Information Security & Risk Management)** |
|  |
| **Information Security Policies and Procedures** |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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* 1. Information Security Control Measures

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| *SARS wants to know how the Bidder implements information security control measures in its organisation. The Bidder must provide all relevant documentation that shows its information security level and how it will benefit SARS in the delivery of the Services.*  *The Bidder will be evaluated formally and generally on the following basis:*   * *The Bidder has shown its approach to Information Security Control Measures being implemented. The evidence needs to be provided by the Bidder’s duly appointed Auditor and such compliance letter needs to indicate all ISMS requirements as it relates to Control Measures as stipulated in the ISO 27001 framework.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *Statutory compliance* | *The Bidder must make a declaration that it complies with all legislative and regulatory provisions.* |
| *Information security control measures* | *Bidder must provide a detailed description of their solution regarding the protection of data at the Bidder’s site and the transmission of information to and from the Bidder’s site. The description should include a detailed technical diagram indicating both physical and logical protection mechanisms including information and IT security measures (logical access control [passwords]; firewalls; intrusion prevention; anti-virus; audit capability).*  *Descriptions of appropriate safeguards (through technical controls) against the unauthorised access, destruction, loss, or alteration of SARS’s confidential Information under the management of the Bidder.*  *Description of processes and procedures implemented to secure the Bidder’s hardware and software, and to prevent unauthorised access to the Bidder’s environment to protect the confidentiality, integrity, and non-repudiation of SARS’s confidential information that is transmitted through and/or stored on Bidder’s infrastructure.* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Compliance statement”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document provides declaration of statutory compliance”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** | |
| **Information Security** | |
| **Statutory compliance** | **Comply/Do not comply** |
| The Bidder declares that the Bidder complies in all respects with all legislative and regulatory provisions. |  |
| **Information Security Control Measures** | |
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| **Response Table B: References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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| **Response Table A** | | |
| **Personnel Security** | | |
| **Personnel vetting** | | |
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* 1. SECURITY INCIDENT MANAGEMENT

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| *SARS aims to establish the Bidder’s management approach to Security-related incidents. The Bidder must give as much information as possible to justify its claims that its way of handling security-related incidents will benefit SARS in the delivery of this service.*  *The Bidder will be evaluated formally and generally on the following basis:*   * *The Bidder has shown its approach to Security Incident Management as stipulated in the ISO 27001 framework which includes Identification, Assessment, Decision and Response to information-security events. The evidence needs to be provided by the Bidder’s duly appointed Auditor and such compliance letter needs to indicate all ISMS requirements as it relates to Security Incident Management as stipulated in the ISO 27001 framework.* | | |
| **Instructions for completing Response Table A below.**   * *The Bidder must complete all fields in Response Table A in full.* | | |
|  | **Field name** | ***Instructions*** |
| *Security-related Incident Management* | *The Bidder must provide a proposal for security-related incident handling related to the service provided to SARS (Plan to address the handling of security incidents; press releases related to incidents; reporting to SARS etc.)* |
|  | |
| **Instructions for completing Response Table B below.**   * *The Bidder is encouraged to attach any additional documentation to substantiate claims made in its answer(s) in Response Table A. It remains the Bidder’s responsibility to provide sufficient information to support its claim to satisfy this technical requirement.* * *All additional documentation must be attached in a subsection of the Additional Documentation Section (Section 6) at the end of this template. The Bidder must create a new subsection in the Additional Documentation Section (Section 6) for each additional document and place the document within the subsection.* * *The Bidder must provide the following information in Response Table B: References to Additional Documentation for each document the Bidder has attached.* | | |
|  | **Field name** | ***Instructions*** |
| Reference | *The reference where the document can be found must be entered in this field (e.g. Section 6.1).* |
| Document Title | *The name of the document (e.g. “Security Incident Procedures”).* |
| Submitted in support of | *The Bidder must indicate what aspect of the Bidder’s response in Table A is supported by the document. (e.g. “Document attached sets out the standard company procedures for managing security incidents”).* |
| * *The Bidder may add more rows to Response Table B: References to Additional Documentation if necessary.* | | |

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| **Response Table A** |
| **Security Incidents** |
| **Security Incident Management** |
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| **Response Table B** | | |
| **References to Additional Documentation** | | |
| **Reference** | **Document Title** | **Submitted in Support of** |
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1. Authorised Signature of Bidder

*I declare that the responses and the information provided are accurate, complete, and correct and that I am authorised to sign this declaration on behalf of the Bidder.*

|  |  |
| --- | --- |
| **Signature of Bidder’s Authorised Signatory** |  |
| **Name** |  |
| **Capacity** |  |
| **Date** |  |

1. Additional Documentation 
   1. [Reference Material Title]

**[Insert document content here]**

* 1. [Reference Material Title]

**[Insert document content here]**

* 1. [Reference Material Title]

**[Insert document content here]**

* 1. [Reference Material Title]

**[Insert document content here]**

[THE ACTUAL DOCUMENT MUST BE PASTED IN HERE]

[THE BIDDER MAY INCLUDE MORE SUBSECTIONS TO ACCOMMODATE MORE ADDITIONAL DOCUMENTATION]