

SOUTH AFRICAN REVENUE SERVICE

REQUEST FOR PROPOSAL (RFP)

RFP 03/2024

Network, Server and End-user Device Support Services

MAIN RFP DOCUMENT

INSTRUCTIONS, GUIDELINES AND CONDITIONS OF TENDER

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REQUEST FOR PROPOSAL

Summary, Guidelines, Conditions and Instructions

1 PURPOSE OF THIS RFP

- 1.1 The purpose of this RFP is for the South African Revenue Service (SARS) to invite suitably qualified service providers (Bidders) to submit proposals (tenders) in accordance with the rules set out in this RFP for appointment as a service provider(s) on a non-exclusive basis.

2 PREAMBLE

- 2.1 SARS invites suitably qualified service providers to submit proposals in accordance with the rules that are set out in this RFP for the supply of the areas of scope (each of which will be referred to as a "Tower") listed below on a non-exclusive basis and as defined in more detail in this and other documents that form part of this RFP.

<p>Network Support Services (Tower N)</p>	<p>The supply of Network Support Services to SARS, including:</p> <ul style="list-style-type: none"> (i) Hardware break-fix services; (ii) Install, move, add, change and decommissioning and related services; (iii) Maintenance and administration services; (iv) Supply of network software and maintenance; (v) Project management and delivery services; (vi) Consulting services; (vii) consumable supply and install services; (viii) Supply and installation of cabling; (ix) Supply of selected application and security services; (x) Supply of network equipment during break-fix activities; and (xi) Related account and service management services for SARS's router, switch, PABX and related network environment.
<p>Server Support Services (Tower S)</p>	<p>The supply of Server Support Services to SARS, including:</p> <ul style="list-style-type: none"> (i) Hardware break-fix services; (ii) Install, move, add, change and decommissioning and related services; (iii) Project management and delivery services; (iv) Consulting services; (v) Consumable supply and install services; and (vi) Related account and service management services for SARS's server, server peripherals, rack-mounted storage subsystems and related server equipment environment.

End-user Device Support Services (Tower E)	The supply of End-user Device Support Services to SARS, including: (i) Hardware break-fix services; (ii) Install, move, add, change and decommissioning and related services; (iii) Project management and delivery services; (iv) Consulting services; (v) Consumable supply and install services; and (vi) Related account and service management services for SARS's desktop, laptop, handheld, monitor, projector, scanner, multifunctional printer and related end-user peripheral device environment.
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3 OBJECTIVE CRITERIA AND ALLOCATION METHODOLOGY

- 3.1 SARS's objective criteria are based on its risk management framework, as well as the equitable distribution and sharing of resources among suppliers, to promote inclusive economic participation amongst bidders. For SARS to achieve its objective criteria, it intends to award different Bidders for each tower. Therefore, SARS aims to award a maximum of one (1) tower to a Bidder for which the Bidder has submitted a bid. The bid is designed to provide a framework that will enable a broad base of Bidders an opportunity to participate in the economy and in turn contribute towards overall SARS' Specific Goals as depicted in SBD6.1.
- 3.2 If a Bidder(s) has scored the highest number of points (first-ranked scoring Bidder) on consolidation of preference points for more than one tower, SARS will apply the following allocation methodology criteria:
- a) The Bidder(s) in question will be considered for award for the tower with the highest contract portion value for which the Bidder(s) has submitted a bid;
 - b) The remaining tower(s) to which the Bidder(s) has scored the highest number of preference points will be considered for award to the second-ranked scoring Bidder(s).
 - c) In the case where the second-ranked scoring Bidder(s) is already a first-ranked scoring Bidder(s) in another tower, the Bidder(s) next in line of ranking will be considered for award for that tower.
- 3.3 If there are towers that remain unallocated after the maximum allocation of one (1) tower per Bidder, SARS reserves the right to allocate the remaining tower(s) to the first-ranked scoring Bidder.
- 3.4 If this allocation methodology results in material price differences that are unaffordable to SARS and materially exceed the budget value/allocations, SARS reserves the right to award the specific tower to the first-ranked scoring Bidder, notwithstanding the above objective criteria.

4 OVERVIEW OF SARS'S REQUIREMENTS

4.1 Summary of the scope

- 4.1.1 Details of the scope of work and the required goods and services are defined in more detail in the Business Requirement Specifications (BRS) document and other documents that form an integral part of this RFP.

4.2 Background

Achieving SARS's Vision 2024 of a smart, modern SARS with unquestionable integrity that is trusted and admired is of paramount importance. Pivotal to the delivery of SARS's vision are our digital platforms and technology infrastructure. To foster Strategic Objective 9 of building public trust and confidence, our technology assets must demonstrate the highest levels of robustness and security. It is for these reasons, inter alia, that SARS measures SARS on a planned 99% system and infrastructure uptime and zero security breaches from known risks. In support of this, the mandate is executed through partnering with third-party suppliers to provide services and products to enable the achievement of organisational objectives, among others.

This tender for the Tower Infrastructure contracts for Towers N, S and E is aligned with several of SARS's Strategic Objectives, including:

Objective 1: Clarity and certainty for taxpayers and traders of their obligations;

Objective 2: Make it easy for taxpayers and traders to comply with their obligations;

Objective 6: Modernise our systems to provide digital and streamlined services; and

Objective 5: Increase and expand the use of data within a comprehensive knowledge management framework to ensure integrity, drive insight and improve outcomes.

5 STRUCTURE OF THE RFP PACK

5.1 Structure

5.1.1 This RFP pack is organised in five (5) sections that each consist of one document or more.

Table 1: RFP pack outline and contents

Section	Index	Description of section contents
1	Main RFP Document	Documents outlining the main RFP guidelines, instructions, conditions and documents necessary for a Bidder to submit a proposal.
2	Business Requirement Specifications (BRS)	Document(s) outlining the BRS, technical requirements and other information required by a Bidder to submit a proposal.
3	Standard Bid Documents (SBDs)	SBDs and other administrative documents that are required by National Treasury and SARS Procurement to be read, completed and returned as part of a Bidder's proposal.
4	Contract management	The proposed agreement under which SARS wishes to contract the services.

5	Response templates	Where applicable, response templates that are required to be completed and returned as part of a Bidder's proposal.
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5.1.2 RFP Pack Contents

Section	Document name	Document file name
1	RFP Invitation Letter	SARS RFP 03-2024 1-0 Invitation letter
	RFP Main Document	SARS RFP 03-2024 1-1 Network, Sever and End-user Device Support Services Summary Guidelines Instructions and Conditions
2	BRS	SARS RFP 03-2024 2-1 Business Requirements Specification
	SARS Site Classifications	SARS RFP 03-2024 2-2 Tower N Site Classifications
		SARS RFP 03-2024 2-2 Tower S Site Classifications
		SARS RFP 03-2024 2-2 Tower E Site Classifications
	SARS Devices per Site	SARS RFP 03-2024 2-3 Tower N Equipment Inventory
		SARS RFP 03-2024 2-3 Tower N Yealink Video Conferencing Equipment Specification
		SARS RFP 03-2024 2-3 Tower S Server devices
		SARS RFP 03-2024 2-3 Tower E Devices per site
3	Invitation to Bid (SBD1)	SARS RFP 03-2024 3-1 Invitation to Bid (SBD 1)
	Declaration of Interest (SBD 4)	SARS RFP 03-2024 3-2 Declaration of Interest (SBD 4)
	National Industrial Participation Programme (SBD 5)	SARS RFP 03-2024 3-3 National Industrial Participation Program (SBD 5)
	Preference Points Claim Form (SBD 6.1)	SARS RFP 03-2024 3-4 Preference Points Claim Form (SBD 6.1)
	Supplier Cost and Risk Assessment Questionnaire	SARS RFP 03-2024 3-5 Supplier Cost and Risk Assessment Questionnaire
4	Network, Server and End-user Device Support Services Agreement	SARS RFP 03-2024 4-1 Network, Server and End-user Device Support Services Agreement
	Data Protection Agreement	SARS RFP 03-2024 4-2 Network, Server and End-user Device Support Services Data Protection Agreement
	Appendix E-4	SARS RFP 03-2024 4-3 Appendix E-4 Incident Management Major Priority Process
		SARS RFP 03-2024 4-3 Appendix E-4 Manage ICT incidents
	Contract Response Template	SARS RFP 03-2024 4-4 Tower N Contract Response Template
		SARS RFP 03-2024 4-4 Tower S Contract Response Template
		SARS RFP 03-2024 4-4 Tower E Contract Response Template
5	Tower N Mandatory Response Template	SARS RFP 03-2024 5-1-N Tower N Mandatory Response Template

Section	Document name	Document file name
	Tower S Mandatory Response Template	SARS RFP 03-2024 5-1-S Tower S Mandatory Response Template
	Tower E Mandatory Response Template	SARS RFP 03-2024 5-1-E Tower E Mandatory Response Template
	Tower N Technical Response Template	SARS RFP 03-2024 5-2-N Tower N Technical Response Template
	Tower S Technical Response Template	SARS RFP 03-2024 5-2-S Tower S Technical Response Template
	Tower E Technical Response Template	SARS RFP 03-2024 5-2-E Tower E Technical Response Template
	Tower N Pricing Response Template	SARS RFP 03-2024 5-3-N Tower N Pricing Response Template
	Tower S Pricing Response Template	SARS RFP 03-2024 5-3-S Tower S Pricing Response Template
	Tower E Pricing Response Template	SARS RFP 03-2024 5-3-E Tower E Pricing Response Template
	Proposal Checklist	SARS RFP 03-2024 5-4 Proposal Response Checklist

6 KEY ACTIVITIES AND DATES

- 6.1 The table below lists certain key dates and activities relevant from the date of issue of the RFP up to the closing date.

Table 2: Key activities and dates

No.	Activity	Date/Time /Details
1.	Bid Number:	RFP 03/2024
2.	Description:	Network, Server and End-user Device Support Services
3.	Duration of contract:	The successful Bidder will be appointed for five (5) years, with an option to renew the contract for a further period of two (2) years, at SARS's sole discretion, subject to SARS's terms and conditions.
4.	Validity period of proposals:	Submitted bids will be valid for 180 (one hundred and eighty) calendar days from the closing date. However, SARS may, subject to the Bidders' consent, extend the validity period prior to the expiry thereof.
5.	Advertisement of the RFP:	SARS website: 24 May 2024 National Treasury e-Tender Portal: 24 May 2024
6.	RFP pack (complete set of bid documents) available for	24 May 2024

	download from the National Treasury e-Tender Portal and SARS website:	
7	<p>Compulsory in-person/virtual briefing session date, location and address: (A Bidder must attend the in-person or virtual session, or may attend both)</p>	<p>The compulsory briefing session will take place on: 10 June 2024 at 11:00. Registration from 09:00.</p> <p><u>Address for in-person attendance:</u> Auditorium, Second Floor, Linton House, Brooklyn Bridge, 570 Fehrsen Street, Brooklyn, Pretoria</p> <p><u>Login details for virtual attendance:</u> Microsoft Teams meeting and can be accessed at the following link: Click Join the meeting now Meeting ID: 311 144 909 946 Passcode: KvF3Hj Download Teams Join on the web</p> <p>NB: Bidders are requested to arrive and/or login at 09:00 for registration.</p> <p>NB: A Bidder must attend the in-person or virtual session or may attend both.</p>
8.	<p>Compulsory virtual Price Templates workshop date and address: (A Bidder must attend the virtual session)</p>	<p>The compulsory price templates workshop will take place on: 11 June 2024 at 11:00. Registration from 09:00.</p> <p><u>Login details for virtual attendance:</u> Microsoft Teams meeting and can be accessed at the following link: Join the meeting now Meeting ID: 313 542 406 792 Passcode: 4qdFnb Download Teams Join on the web</p> <p>NB: Bidders are requested to login at 09:00 for registration.</p>
9.	Bidders to submit written questions between:	From 24 May 2024 to 14 June 2024
10.	SARS to respond to Bidders' written questions on or before:	29 May 2024 to 18 June 2024
11.	Closing date and time (proposals due):	05 July 2024 at 11:00

- 6.2 All dates and times in this RFP are South African Standard Time. The establishment of a time or date in this RFP does not create an obligation on the part of SARS to take any action or create any right or expectation in any way for any Bidder to demand that any action be taken on the date established, or on any other date. A Bidder accepts that if SARS extends the deadline (closing date) for proposal submissions for any reason whatsoever, the requirements of this RFP will apply equally to the extended deadline.

7 COMMUNICATION

- 7.1 All communication to SARS must be addressed to the SARS Tender Office and emailed to tenderoffice@sars.gov.za, and must contain a clear reference to this RFP. Communication sent by SARS must only be regarded as official communication if sent from tenderoffice@sars.gov.za, or a communication accompanied by a letter of authorisation signed by the SARS Procurement Executive.
- 7.2 A Bidder may not communicate with SARS regarding this RFP other than through the official contact provided in this document. SARS may, at its sole discretion, disqualify a Bidder if the Bidder communicates or attempts to communicate any information regarding this RFP to any of SARS's employees, officials or third parties involved in the preparation, evaluation or award of the RFP other than through the official contact provided.

8 TENDER PREPARATION AND SUBMISSION

8.1 Introduction

- 8.1.1 SARS has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under section 76 of the Public Finance Management Act, 1999 (Act 1 of 1999), which prescribes that SARS's procurement processes be:
- 8.1.1.1 Economical, efficient, fair, equitable, transparent, competitive and cost effective; and
 - 8.1.1.2 Consistent with the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), its regulations, and the Broad-Based Black Economic Empowerment (B-BBEE) Act, 2003 (Act 53 of 2003).

8.2 Question-and-answer process

- 8.2.1 A Bidder may submit questions to SARS as part of the question-and-answer process to gain a full understanding of any aspect of the RFP that is not clear to it.
- 8.2.2 Between the dates given in **paragraph 5**, SARS will receive written questions sent by Bidders by email through the official contact provided in this document. SARS will respond to these questions but is not obliged to respond to a question that, in its opinion, is inappropriate and does not reasonably warrant an answer. The questions and answers will be published on the National Treasury e-Tender Portal and the SARS website. The identity of a Bidder who has directed a question to SARS will not be disclosed by SARS in such responses.
- 8.2.3 SARS may issue updated versions of documents issued in the RFP pack and/or additional documentation to form part of the RFP pack. Such re-issued or additional documentation will be published on the National Treasury e-Tender Portal and SARS website. It is a Bidder's responsibility to visit the National Treasury e-Tender Portal and SARS website regularly to ensure that it uses the latest versions of documents in the RFP pack.

- 8.2.4 **The National Treasury e-Tender Portal must be treated as the primary means of communication. Should there be any other communication that conflicts with communication posted on the National Treasury e-Tender Portal, the National Treasury e-Tender Portal communication will prevail.**

8.3 Central Supplier Database

- 8.3.1 All Bidders who wish to do business with SARS must register on government's Central Supplier Database (CSD) and include their CSD Master Registration Number in their submission. The recommended Bidder(s) must be registered on the CSD prior to an award letter/purchase order signed contract being issued.

8.4 Proposal submission

- 8.4.1 For this RFP, SARS will accept proposal submissions in the form of physical proposal submissions, either deposited in the SARS tender box or posted to the SARS Tender Office.
- 8.4.2 The physical proposal submissions must be deposited in the SARS tender box on or before the closing date and time at the SARS Tender Office, situated at the main entrance at:

**SARS Procurement Tender Office,
Lehae La SARS,
299 Bronkhorst Street, Nieuw Muckleneuk, Brooklyn,
Pretoria, 0181.**

- 8.4.3 The proposals may also be couriered to the address provided in the paragraph above.
- 8.4.4 Proposals will only be considered if received by the SARS Tender Office before the closing date and time, regardless of the method used.
- 8.4.5 Late proposals will not be accepted.
- 8.4.6 The onus is on the Bidder to ensure that its proposal submission and documentation received by SARS in this bid are submitted timeously and are accurate and complete. Failure by any Bidder to discharge this onus will result in proposal submissions being disqualified for consideration.

8.5 Instruction for submitting a proposal

- 8.5.1 This section details the instructions to Bidders for preparing a proposal in response to this RFP, which must be followed in detail to enable the information contained in a Bidder's proposal to be read, understood and evaluated in a common and consistent layout, and to ensure that the information submitted is correct, complete and well structured. Should a proposal be received that is not in the correct format, SARS reserves the right to disqualify the entire proposal or portions of the proposal, depending on the extent of the deviation from the format described in this document.
- 8.5.2 All proposals and supporting documentation must be submitted in English.

8.5.4 A Bidder's proposal must be submitted in two forms:

1 x Hardcopy submission	One (1) hardcopy submission clearly marked. A "hardcopy submission" means an A4 ring bound lever arch file.
1 x Electronic submission	One (1) electronic submission of a complete copy of the hardcopy submission. An "electronic submission" means a memory stick (USB stick) containing a complete copy of the hardcopy submission. The onus is on the Bidder to ensure that the electronic submission submitted is a complete copy of the hardcopy submission.

8.5.5 The hardcopy and electronic submissions must be marked and labelled correctly, and outer sealed, wrapped and packaged for ease of reference during the evaluation process.

8.5.6 Bidders are requested to refer to **paragraph 13**, which is a guide of what a Bidder must submit in its proposal.

9 EVALUATION OF PROPOSALS

9.1 Process after the closing date

9.1.1 After the closing date and time, SARS will evaluate the proposals with reference to its evaluation criteria. SARS reserves the right to employ subject matter experts to assist in performing such evaluations.

9.2 Prequalification evaluation process (Gate 0)

9.2.1 SARS has defined minimum administrative prequalification criteria that must be met by a Bidder. The table below contains the administrative prequalification documents that are required as part of a Bidder's proposal, which must be completed and signed by the duly authorised representative of the prospective Bidder(s).

9.2.2 Where a Bidder's proposal fails to comply fully with any of the prequalification criteria, SARS may, at its discretion, allow the Bidder an opportunity to submit and/or supplement the information and/or documentation provided within a grace period of **seven (7) working days** or such alternative period as SARS may determine to achieve full compliance with these criteria before disqualifying the Bidder.

9.2.3 **SARS will disqualify a Bidder who does not fully comply with the prequalification SBD after the grace period provided by SARS.**

Table 3: Prequalification criteria

No:	Prequalification documents to be submitted	Instructions	Will non-submission result in disqualification?
1.	SBD 1: Invitation to bid form	Bidder to complete and sign the supplied pro forma document.	YES
2.	SBD 4: Bidder's disclosure	Bidder to complete and sign the supplied pro forma document.	YES
3.	SBD 5: National Industrial Participation Programme form	Bidder to complete and sign the supplied pro forma document.	YES
4.	SBD 6.1: Preference points claim form	Bidder to complete and sign the supplied pro forma document to claim points for B-BBEE/specific goals.	NO Non-submission will lead to a zero score on B-BBEE/specific goals.
5.	Proof of registration on the CSD	Bidder to submit the proof of registration on CSD.	NO However, a Bidder must be registered on the CSD to be considered for award.
6.	Supplier Cost and Risk Assessment Questionnaire	Bidder to complete and sign the supplied pro forma document.	NO
7.	A complete set of three (3) most recent years' annual financial statements	Submit complete sets of three (3) most recent years' annual financial statements according to the requirements of the Financial Risk Analysis paragraph as detailed in this RFP.	NO

9.3 Mandatory evaluation process (Gate 1) per Tower N, Tower S and Tower E

9.3.1 Only Bidders who have met the prequalification criteria in Gate 0 will be evaluated in Gate 1 for mandatory evaluation. The table below contains the mandatory evaluation criteria.

9.3.2 **If a Bidder does not meet any of the mandatory evaluation criteria, it will be disqualified, and the Bidder's proposal will not be evaluated further.**

Table 4: Mandatory evaluation criteria for Tower N

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is only interested in organisations that take accountability for service delivery and performance.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and be operating in South Africa.</p> <p>NB: The Bidder must have attached its Companies and Intellectual Property Commission (CIPC) registration documents. An unincorporated Joint Venture (JV) must submit individual CIPC registration documents and JV agreement. An incorporated JV must submit its consortium CIPC registration documents and JV agreement.</p>
2.	Cisco Gold Partner Certification	<p>The Bidder must have a valid (as at the closing date of this tender) CISCO GOLD Partner certificate to provide the services for which it is bidding for in Tower N.</p> <p style="text-align: center;">and</p> <p>The Bidder must be a CISCO Integrator with the following specialisations;</p> <ul style="list-style-type: none"> • Advanced Enterprise Networks Architecture; • Advanced Data Center Architecture; and • Advanced Security Architecture. <p>NB: The Bidder itself must be a CISCO Gold Partner and cannot rely on a subcontractor to fulfil this requirement.</p> <p>NB: The Bidder must provide the following proof from CISCO to verify their status as a Gold partner and certification level with respective architecture specialisations:</p> <ol style="list-style-type: none"> 1. Manufacturing Authorisation Form (MAF confirms that the Bidder is a CISCO Gold Partner); and 2. Certification letter with Specialisations in Advanced Enterprise Networks Architecture, Advanced Data Center Architecture, and Advanced Security Architecture.
3.	Bidder's Network-related Services Delivery History	<p>The Bidder must have provided network-related services for a cumulative period of 2 (two) years over the past five (5) years, to at least 2 (two)</p>

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>South African customer organisations and supporting at least 1 500 (one thousand five hundred) CISCO network devices (routers, switches, firewalls), including CISCO Meraki network devices (10% of 1 500) at each customer organisation.</p> <p>The Bidder itself must have been providing such services and cannot rely on a subcontractor to fulfil this requirement.</p> <p>NB: The Bidder must complete all fields in the response table.</p>
4.	Network Device Support Coverage	<p>The Bidder must have a national coverage with established network support Service Centres in all provinces of the Republic of South Africa from which it services its current customer base and be able to provide the expected service levels requirements for support and maintenance to all SARS sites.</p> <p>NB: For each Service Centre, the Bidder must submit documentation proving the established nature of the Service Centre. Such documentation may be a municipal account, current lease agreement or utility account relating to the established Service Centre of the Bidder or of its subcontractor. Any account submitted to support the Bidder's claim must not be older than 90 days as at the Closing Date.</p>
5.	Declaration that the Bidder has submitted a Proposal for all required services for Tower N	<p>The Bidder must declare its ability (including the subcontracted capability of its Subcontractors) to provide all Tower N Services at every SARS site for all equipment types listed at each SARS site.</p> <p>NB: The Bidder must complete all fields in the response table.</p>
6.	Compulsory Briefing Session (in-person/virtual)	<p>The Bidder must have attended the compulsory Briefing Session.</p> <p>NB: An attendance register will be taken at the in-person and virtual Compulsory Briefing Session, and a certificate of attendance will be issued (which the bidder must submit as part of the Mandatory requirement, as per the Mandatory Response template). If the Bidder does not attend this compulsory briefing session (in-person or virtual), the Bidder will be disqualified.</p>
7.	Compulsory Price	The Bidder must have attended the compulsory price templates

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
	Templates workshop session (virtual)	workshop session. NB: An attendance register will be taken at the virtual compulsory price templates workshop session and a certificate of attendance will be issued (which the Bidder must submit as part of the mandatory requirement, as per the Mandatory Response template). If the Bidder does not attend this compulsory price templates workshop session (virtual), the Bidder will be disqualified.

Table 5: Mandatory Evaluation Criteria for Tower S

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is only interested in organisations that take accountability for service delivery and performance.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and be operating in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration documents. An unincorporated JV must submit individual CIPC registration documents and JV agreement. An incorporated JV must submit its consortium CIPC registration documents and JV agreement.</p>
2.	Dell Gold Partner Certification	<p>The Bidder must have a valid (as at the closing date of this tender) DELL Gold Partner certificate to provide the services for which it is bidding for in Tower S.</p> <p>NB: The Bidder itself must be a DELL Gold Partner and cannot rely on a subcontractor to fulfil this requirement.</p> <p>NB: The Bidder must provide a Manufacturing Authorisation Form (MAF) from DELL, which confirms that the Bidder is a DELL Gold Partner to verify its status as a Gold partner and certification level.</p>
3.	Bidder's Server Related Services Delivery History	The Bidder must have provided Server-related services for a cumulative period of two (2) years over the past five (5) years, to at least two (2) South

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>African customer organisations and supporting at least 500 (five hundred) physical servers at each customer organisation.</p> <p>NB: The Bidder must complete all fields in the response table.</p>
4.	Server Device Support Coverage	<p>The Bidder must have national coverage with established Server support Service Centres in all provinces of the Republic of South Africa from which it services its current customer base and be able to provide the expected service levels requirements for support and maintenance to all SARS sites.</p> <p>NB: For each Service Centre, the Bidder must submit documentation proving the established nature of the Service Centre. Such documentation may be a municipal account, current lease agreement or utility account relating to the established Service Centre of the Bidder or of its subcontractor. Any account submitted to support the Bidder's claim must not be older than 90 days as at the Closing Date.</p>
5.	Declaration that the Bidder has submitted a Proposal for all required services for Tower S	<p>The Bidder must declare its ability (including the subcontracted capability of its Subcontractors) to provide all Tower S Services at every SARS site for all equipment types listed at each SARS site.</p> <p>NB: The Bidder must complete all fields in the response table.</p>
6.	Compulsory Briefing Session (in-person/virtual)	<p>The Bidder must have attended the compulsory Briefing Session.</p> <p>NB: An attendance register will be taken at the in-person and virtual Compulsory Briefing Sessions, and a certificate of attendance will be issued (which the bidder must submit as part of the Mandatory requirement, as per the Mandatory Response template). If the bidder does not attend this compulsory briefing session (in-person or virtual), the bidder will be disqualified.</p>
7.	Compulsory Price Templates workshop session (virtual)	<p>The Bidder must have attended the compulsory price templates workshop session.</p> <p>NB: An attendance register will be taken at the virtual compulsory price templates workshop session and a certificate of attendance will be issued (which the Bidder must submit as part of the mandatory requirement, as per the Mandatory Response template). If the Bidder</p>

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
		does not attend this compulsory price templates workshop session (virtual), the bidder will be disqualified.

Table 6: Mandatory Evaluation Criteria for Tower E

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is only interested in organisations that take accountability for service delivery and performance.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and be operating in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration documents. An unincorporated JV must submit individual CIPC registration documents and JV agreement. An incorporated JV must submit its consortium CIPC registration documents and JV agreement.</p>
2.	Bidder's End-user Device-related Services Delivery History	<p>The Bidder must have provided End-user device support services for a cumulative period of two (2) years over the past five (5) years, to at least 2 (two) South African customer organisations and supporting at least 10 000 (ten thousand) End-user devices at each customer organisation.</p> <p>NB: The Bidder must complete all fields in the response table.</p>
3.	End-user Device Support Coverage	<p>The Bidder must have a national coverage with established End-user device support Service Centres in all provinces of the Republic of South Africa from which it services its current customer base and be able to provide the expected service levels requirements for support and maintenance to all SARS sites.</p> <p>NB: For each Service Centre, the Bidder must submit documentation proving the established nature of the Service Centre. Such documentation may be a municipal account, current lease agreement or utility account relating to the established Service Centre of the Bidder or of its subcontractor. Any account submitted to support the Bidder's claim must not be older than 90 days as at the Closing Date.</p>

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
4.	Declaration that the Bidder has submitted a Proposal for all required services for Tower E	<p>The Bidder must declare its ability (including the subcontracted capability of its subcontractors) to provide all Tower E Services at every SARS site for all equipment types listed at each SARS site.</p> <p>NB: The Bidder must complete all fields in the response table.</p>
5.	Compulsory Briefing Session (in-person/virtual)	<p>The Bidder must have attended the compulsory Briefing Session.</p> <p>NB: An attendance register will be taken at the in-person and virtual Compulsory Briefing Sessions, and a certificate of attendance will be issued (which the Bidder must submit as part of the Mandatory requirement, as per the Mandatory Response template). If the bidder does not attend this compulsory briefing session (in-person or virtual), the bidder will be disqualified.</p>
6.	Compulsory Price Templates workshop session	<p>The Bidder must have attended the compulsory price templates workshop session.</p> <p>NB: An attendance register will be taken at the virtual compulsory price templates workshop session and a certificate of attendance will be issued (which the Bidder must submit as part of the mandatory requirement, as per the Mandatory Response template). If the Bidder does not attend this compulsory price templates workshop session (virtual), the Bidder will be disqualified.</p>

9.4 Technical evaluation process (Gate 2) per Tower N, Tower S and Tower E

- 9.4.1 Only Bidders who have met the prequalification and mandatory evaluation requirements 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 goods and services that meet SARS's requirements, and that is financially competitive and offers value for money.
- 9.4.2 The technical evaluation will be scored out of 100 points, and Bidders are required to score a minimum threshold of 70 out of 100 points to proceed to the next stage of evaluation, namely, price and B-BBEE/specific goals evaluation.
- 9.4.3 **If a Bidder does not meet the technical evaluation minimum threshold, it will be disqualified, and its proposal will not be evaluated further.**

9.4.5 Technical Evaluation Criteria for Tower N

Table 7: Technical Evaluation Criteria point allocation (Tower N)

Criterion	Description	Weighting for Tower N	Evaluation values
Capability	Bidder's track record and current supported customer base, skills.	25	Maximum points towards this criterion will be achieved by the Bidder who can demonstrate proof of a sustainable business, demonstrate proof of sufficient resources, its representation in areas throughout the Republic that will adequately support SARS's Sites.
Solution	Bidder's solution meets or exceeds the service requirements.	45	Maximum points towards this criterion will be achieved by the Bidder(s) whose solution meets all aspect of the Service specifications.
Service Management	Bidder's ability to provide service management requirements in terms of this RFP.	15	Maximum points towards this criterion will be achieved by the Bidder(s) whose Proposal contains a solution that meets all aspects of the service management scope set out in this RFP.
Transition	The Bidder's proposal to transition current provider(s) to the Bidder's proposed solution and the Bidder's proposal to manage risk and quality.	15	A Proposal that demonstrates a complete plan for Transition of all the scope of Services at minimal or no risk, together with a comprehensive risk and quality management approach will achieve maximum points.
Total for Functionality		100	

9.4.5.1 Capability Criterion (25 Points)

9.4.5.1.1 The evaluation of the Capability criterion of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the Technical Response Template (TRT) at the reference given in the column "TRT Reference" in **Table 7.1 Capability Criterion Evaluation** below.

Table 7.1: Technical evaluation criteria – Capability Criterion (25 points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference								
1.1.	Subcontractor Dependency ≤40%	<p>SARS seeks to establish the extent to which the Bidder relies 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.</p> <p>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 service delivery will achieve maximum points for this criterion.</p> <p>Documentation must be attached by the Bidder to substantiate its claims to achieve maximum points.</p> <p>Does the Bidder have established/formal subcontracting agreements with its proposed subcontractors; and does the extent of its reliance on subcontractors pose any risk to SARS?</p> <table><tr><th>% of sub-contracting</th><th>Risk Level</th></tr><tr><td>≤ 29%</td><td>Low</td></tr><tr><td>30- 40 %</td><td>Medium</td></tr><tr><td>< 41 %</td><td>High</td></tr></table>	% of sub-contracting	Risk Level	≤ 29%	Low	30- 40 %	Medium	< 41 %	High	<p>4: Most elements of the scope are currently delivered by the Bidder and low risk of ≤29% of the total contract value is placed on subcontractor(s), which are formally proposed and contracted.</p> <p>2: Few elements of the scope are currently delivered by the Bidder and medium risk of =30-40% of the total contract value is placed on subcontractor(s), which are formally proposed and contracted.</p> <p>0: Less elements of the scope are currently delivered by the Bidder and ≥ 40% of the total contract value is placed on subcontractors for which evidence has or not been provided as the formality of the engagement. The elements of scope subcontracted are assessed to be high risk.</p> <p><i>Note to Bidder/Evaluator: Cabling Services, PADS4 Support and Maintenance and Equipment Transport Services are expected to be outsourced to subcontractors and forms part of the above percentages.</i></p>	4 = 3.37 2 = 1.69 0 = 0	1.1
% of sub-contracting	Risk Level												
≤ 29%	Low												
30- 40 %	Medium												
< 41 %	High												

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines			Inquiry weighting	TRT Reference								
1.2	Service Centres	<p>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.</p> <p>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.</p>	<p>4: The Bidder's service centres are all located within the maximum distance from SARS key (strategic) Offices and they have the required number of skilled professionals.</p> <p>3: While the Bidder's service centres are generally well-positioned (between 90% to 99% of the service centres are within the maximum distance from key SARS offices) and staffed (between 90% and 99% of the number of skills available match the skills required), there are isolated instances where the proximity or skill availability could be improved.</p> <p>2: The Bidder's service centres show some gaps in either skills (between 80% and 90% of the number of skills available match the skills required) or location coverage (between 80% to 90% of the service centres are within the maximum distance from key SARS offices), which could potentially affect service delivery efficiency.</p> <p>1: The Bidder's service centres lack sufficient coverage in terms of location (between 70% to 80% of the service centres are within the maximum distance from key SARS offices and skills (between 70% and 80% of the number of skills available match the skills required), posing challenges in delivering services effectively and meeting service levels.</p> <p>0: The Bidder's service centres are poorly located (less than 70% of the service centres are within the maximum distance from key SARS offices and lack essential skills (less than 70% of the number of skills available match the skills required), or the Bidder has not attached proof of residence (Utility bills or Lease agreements) for all sites. severely impacting the ability to deliver services and meet service levels effectively.</p>			<p>4 = 1.35</p> <p>3 = 1.01</p> <p>2 = 0.68</p> <p>1 = 0.34</p> <p>0 = 0</p>	1.2								
1.3.	Skills Available to SARS	SARS aims to establish the depth of skills that the Bidder (including its subcontractors) will be able to offer to SARS, required for the Bidder meet the SLA required on all services, if required by SARS, for projects/assignments run from SARS's head office and centres within Gauteng..	4: The Bidder has exceeded the minimum number of skills required per skill level.	<table><tr><th>Skill</th><th>Minimum number of skills required</th></tr><tr><td>CISCO certification (CCNP) and at least three (3) years'</td><td>4</td></tr></table>	Skill	Minimum number of skills required	CISCO certification (CCNP) and at least three (3) years'	4	<table><tr><th>Weight</th></tr><tr><td>4 = 2.70</td></tr><tr><td>2 = 1.35</td></tr></table>	Weight	4 = 2.70	2 = 1.35	<table><tr><th>TRT Reference</th></tr><tr><td>1.3.1</td></tr></table>	TRT Reference	1.3.1
Skill	Minimum number of skills required														
CISCO certification (CCNP) and at least three (3) years'	4														
Weight															
4 = 2.70															
2 = 1.35															
TRT Reference															
1.3.1															

No:	Sub-criterion	Inquiry	Specific evaluation guidelines			Inquiry weighting	TRT Reference
			2: The Bidder has met the minimum number of skills required per skill level.	related and practical experience on general network equipment.		0 = 0	
			0: The Bidder has not supplied the minimum number of skills required per skill level.	CISCO Meraki certification (ECMS1 and two [2]) and at least three (3) years related and practical experience on Meraki equipment.	4	4 = 2.70 2 = 1.35 0 = 0	1.3.2
				CISCO certification (CCIE) and at least 5 (five) years' related and practical experience on specialised network equipment (e.g. CISCO ACI, CISCO Datacentre Switches).	2	4 = 2.70 2 = 1.35 0 = 0	1.3.3
				F5 certification (301 A+B) and at least five (5) years' related and practical experience on Big IP LTM.	2	4 = 2.70 2 = 1.35 0 = 0	1.3.4
				CISCO certification (CCNP) and at least three (3) years' related and practical experience on voice equipment.	2	4 = 0.68 2 = 0.34 0 = 0	1.3.5
				CISCO certification Network Management and 2 (two) years' practical experience on CISCO DNA and PI.	2	4 = 1.35 2 = 0.68 0 = 0	1.3.6

No:	Sub-criterion	Inquiry	Specific evaluation guidelines			Inquiry weighting	TRT Reference
				PADS4 certification and at least two (2) years' related and practical experience on PADS4 Server.	2	4= 1.35 2 = 0.68 0 = 0	1.3.7
				Yealink certification (CIPPE Senior) and at least one (1) year's related and practical experience on Yealink equipment.	2	4= 0.68 2 = 0.34 0 = 0	1.3.8
				Poly certification towards integration with MS Teams and Zoom) and at least 1 (one) year's related and practical experience on Poly equipment.	2	4= 0.68 2 = 0.34 0 = 0	1.3.9
				MS Teams certification (Microsoft 365 Certified: Teams Administrator Associate).	2	4= 0.68 2 = 0.34 0 = 0	1.3.10
				Project Management Certification and at least five (5) years' related and practical experience.	4	4 = 0.68 2 = 0.34 0 = 0	1.3.11
				RSA SecureID Certified Administrator with at least five (5)	2	4 = 0.68 2 = 0.34	1.3.12

No:	Sub-criterion	Inquiry	Specific evaluation guidelines			Inquiry weighting	TRT Reference
				years related and practical experience on RSA appliances.		0 = 0	
				CISCO certification (CCNP/CCIE) with at least five (5) years' practical and related security experience.	2	4 = 1.35 2 = 0.68 0 = 0	1.3.13
1.4.	Proximity of Service Centres to SARS Sites	<p>SARS aims to establish the distribution of capabilities that the Bidder (and its subcontractors) will be able to bring to bear in delivering services to meet the Service Levels.</p> <p>The Bidder's capability (including the capability of its subcontractors) as evidenced by its response to provide services to SARS sites from Service Centres within the performance standards set out in the RFP will score maximum points for this sub-criterion.</p>	<p>4: The ability of the Bidder to respond in less than the required Time at all sites.</p> <p>3: The ability of the Bidder to respond within the required Time at 90% to 99% of all sites.</p> <p>2: The ability of the Bidder to respond within the required Time to at least 80% to 89% of all sites.</p> <p>1: The ability of the Bidder to respond within the required Time to at least 70% to 79% of all sites.</p> <p>0: The ability of the Bidder to respond within the required Time to less than 70% of all sites.</p> <p>Note to Bidder: The distance and time given must assume a reasonable speed or 100 km travel in 1 hour.</p>			4 = 1.35 3 = 1.01 2 = 0.68 1 = 0.34 0 = 0	1.4

9.4.5.2 Technical Solution Criterion (45 points)

9.4.5.2.1 The evaluation of the Solution of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column "TRT Reference" in Table 7.2 Solution Criterion Evaluation below.

Table 7.2: Technical evaluation criteria - Technical Solution Criterion (45 points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines			TRT Reference
			Metric	Objective	Inquiry weighting	TRT Reference
2.1.	WAN, LAN and Wireless Network Equipment Support Services	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, original equipment manufacturer (OEM) relationship, warranty services and whole unit spares holding). Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and Schedule C (SLA's) will achieve maximum points for this sub-criterion.	Recruitment and Retention	4: 0% to 10% per year related to this service.	4 = 0.55	2.1.1
				2: 11% to 30% per year related to this service.	2 = 0.28	
				0: more than 30% per year related to this service.	0 = 0	
			Out of warranty repair and repairs done by third party	4: Repairs done 100% in house by Bidder or via subcontracting to a third party. 0: No out of warranty repairs are done by Bidder.	4 = 0.55 0 = 0	2.1.2
			Parts/Whole Unit Spares Holding	4: Carry Whole unit Spares and Parts for both in and out of warranty devices. 2: Carry Whole unit Spares and Parts for out of warranty devices only. 0: No commitment to carry Whole unit spares and parts.	4 = 3.66 2 = 1.84 0 = 0	2.1.3
				Dependency on third parties 4: 0% dependency on sub-contractor related to this service. 2: 11% to 30% dependency on sub-contractor related to this service. 0 = 0	4 = 0.73 2 = 0.37 0 = 0	2.1.4

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				0: more than 30% dependency on sub-contractor related to this service.		
No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.2	Video Conferencing Equipment Support Services	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and whole unit spares holding). Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and schedule C (SLA's) will achieve maximum points for this sub-criterion.	Recruitment and Retention	4: 0% to 10% per year related to this service. 2: 11% to 30% per year related to this service. 0: more than 30% per year related to this service.	4 = 0.37 2 = 0.18 0 = 0	2.2.1
			Warranty Provider Status	4: Certified for Yealink. 0: Not Certified for Yealink.	4 = 0.37 0 = 0	2.2.2
			Out of warranty repair and repairs done by third party	4: Repairs done 100% in house by the Bidder for both OEM's (Cisco and Yealink). 2: Repairs done by Bidder but via subcontracting to a third party. 0: No out of warranty repairs are done by the Bidder.	4 = 0.37 2 = 0.18 0 = 0	2.2.3
			Parts/Whole Unit Spares Holding	4: Carry Whole unit Spares and Parts for both in and out of warranty devices for both OEM's (Cisco and Yealink) 2: Carry Whole unit Spares and Parts for only in warranty devices for both OEM's 0: No commitment to carry Whole unit spares and parts for in warranty devices for both OEMs	4 = 0.92 2 = 0.46 0 = 0	2.2.4
			Dependency on third parties	4: 0% dependency on sub-contractor related to this service.	4 = 0.73 2 = 0.37	2.2.5

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				2: 11% to 30% dependency on subcontractor related to this service. 0: more than 30% dependency on subcontractor related to this service.	0 = 0	
			OEM Relationship	4: Certified partner for Yealink. 0: Not certified partnership with Yealink.	4 = 0.92 0 = 0	2.2.6
No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.3	Cisco Unified Communication Manager (Voice Equipment) Services	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and whole unit spares holding) Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.	Recruitment and Retention	4: 0% to 10% per year related to this service. 2: 11% to 30% per year related to this service. 0: more than 30% per year related to this service.	4 = 1.84 2 = 0.92 0 = 0	2.3.1
			Dependency on third parties	4: 0% dependency on subcontractor related to this service. 2: 11% to 30% dependency on subcontractor related to this service. 0: more than 30% dependency on subcontractor related to this service.	4 = 1.84 2 = 0.92 0 = 0	2.3.2
No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.4	F5 Load Balancer Support	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and Whole Unit Spares holding) Bidders who can show, with substantiation, that the aspects of the services have been provided and align	Recruitment And Retention	4: 0% to 10% per year related to this service. 2: 11% to 30% per year per year related to this service. 0: more than 30% per year related to this service.	4 = 0.37 2 = 0.18 0 = 0	2.4.1

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		to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.	Out Of Warranty Repair and Repairs Done By third party	4: Repairs done 100% in house by the Bidder. 2: Repairs done by Bidder but via subcontracting to a 3rd Party. 0: No out of warranty repairs are done by the Bidder.	4 = 0.37 2 = 0.18 0 = 0	2.4.2
			Parts/Whole Unit Spares Holding	4: Carry Whole unit Spares and Parts for both in and out of warranty devices. 2: Carry Whole unit Spares and Parts for out of warranty devices only. 0: No commitment to carry Whole unit spares and parts.	4 = 2.20 2 = 1.10 0 = 0	2.4.3
			Dependency On third parties	4: 0% dependency on subcontractor related to this service. 2: 11% to 30% dependency on subcontractor related to this service. 0: more than 30% dependency on subcontractor related to this service.	4 = 0.37 2 = 0.18 0 = 0	2.4.4
			OEM Relationship	4: Certified partner for F5 0: Not certified partner for F5.	4 = 0.37 0 = 0	2.4.5
No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.5	VPN Services, provision of tokens and software for SARS's remote access solution devices (RAS).	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and Whole Unit Spares holding) Bidders who can show, with substantiation, that the aspects of the services have been provided and align	Recruitment and Retention	4: 0% to 10% per year related to this service. 2: 11% to 30% per year related to this service. 0: more than 30% per year related to this service.	4 = 0.92 2 = 0.46 0 = 0	2.5.1

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		to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.	Software integration support for Cisco ASA, Cisco ISE and RSA SecureID	4: CCIE Security engineer with five (5) years' experience dedicated to the account 2: CCNP Security certified engineer with five (5) years' experience dedicated to the account 0: No relevant experience	4 = 2.75 2 = 1.38 0 = 0	2.5.2
			OEM Relationship	4: Certified partner for RAS (SecureID vendor) directly or through a subcontractor 0: Not certified partner for RAS (SecureID vendor)	4 = 1.84 0 = 0	2.5.3
No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.6	Cabling Services	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and Whole Unit Spares holding). Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.	Recruitment and Retention	4: 0% to 10% per year related to this service and includes any subcontractor staff. 2: 11% to 30% per year related to this service. 0: more than 30% per year per year related to this service.	4 = 0.92 2 = 0.46 0 = 0	2.6.1
			Cabling Installations/Repairs	4: Cabling requests and faults can be performed from all designated service centres and within SLAs to all SARS sites. 0: Cabling requests and faults cannot be performed from all designated service centres and within SLAs to all SARS sites.	4 = 3.66 0 = 0	2.6.2

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No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.7	Fraud and Phishing Detection Services	<p>SARS aims to assess the Bidder's solution in terms of completeness and sustainability.</p> <p>Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.</p> <p>The description of the solution must at a minimum:</p> <ul style="list-style-type: none"> • address all required elements of the solution as set out in paragraph 7.6 of the <i>Business Requirements Specification</i>. • provide details of the service proposed. • provide success rates, number of clients, major client references. • detail the methods of proactive monitoring. • provide detail of automated take down functionality. 	Fraud detection capability	<p>4: Comprehensive fraud detection across web, phishing detection, website verification, Daily DNS, Front Page, SSL Site, Mobile App, Social Media, and Search Engine Advertising Fraud Searches.</p> <p>0: No comprehensive fraud detection across web, phishing detection, website verification, Daily DNS, Front Page, SSL Site, Mobile App, Social Media, and Search Engine Advertising Fraud Searches.</p>	<p>4 = 1.47</p> <p>0 = 0</p>	2.7.1
			Automated countermeasures	<p>4: Comprehensive automated systems to identify phishing websites and initiate takedown procedures to remove them from the internet rapidly.</p> <p>0: No comprehensive automated systems to identify phishing websites and initiate takedown procedures to remove them from the internet rapidly.</p>	<p>4 = 0.37</p> <p>0 = 0</p>	2.7.2
			Manual takedown	<p>4: Service proposed includes 1 500 (one thousand five hundred) manual takedowns per year.</p> <p>0: Service proposed less than 1 500 (one thousand five hundred) manual takedowns.</p>	<p>4 = 0.37</p> <p>0 = 0</p>	2.7.3
			OEM Relationship	<p>4: Certified partner for Netcraft directly or through a subcontractor</p> <p>0: Not certified partner for Netcraft</p>	<p>4 = 1.47</p> <p>0 = 0</p>	2.7.4

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No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.8	Firewall Support Services	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and whole unit spares holding) Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.	Recruitment and Retention	4: 0% to 10% per year related to this service. 2: 11% to 30% per year related to this service. 0: more than 30% per year related to this service.	4 = 0.92 2 = 0.46 0 = 0	2.8.1
		The Bidder must provide details of its solution regarding the support for SARS' CISCO ASA firewalls, ACS appliances and ISE software as set out in paragraph 7.8 of the <i>Business Requirements Specification</i> .	Support for Cisco ASA, Firepower	4: CCIE Security engineer with five (5) years' experience dedicated to the account 2: CCSP certified engineer with five (5) years' experience dedicated to the account 0: No relevant experience	4 = 2.75 2 = 1.38 0 = 0	2.8.2
No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.9	Security Assessment Services	SARS aims to assess the Bidder's solution in terms of completeness, sustainability and viability.	Recruitment and Retention	4: 0% to 10% per year related to this service. 2: 11% to 30% per year related to this service. 0: more than 30% per year related to this service.	4 = 1.47 2 = 0.73 0 = 0	2.9.1
		Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.	Experience and expertise	4: Five (5) or more years' experience specifically in penetration testing such as network, web application, mobile application, and social engineering testing. 0: Less than five (5) years' experience	4 = 0.37 0 = 0	2.9.2
		The Bidder must provide details of its solution regarding the support for SARS' Security assessment service requirements as set out in paragraph 7.9 of the <i>Business Requirements Specification</i> .	Qualifications	4: Two (2) or more of key staff has CEH, OSCP, CISSP certification.	4 = 0.37	2.9.3

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				0: No relevant qualifications.	0 = 0	
			Compliance and Accreditation	4: Accreditation with CREST, EC Council, Offensive Security, GIAC, directly or through a sub-contractor. 0: Not certified partner for RSA (SecureID vendor).	4 = 1.47 0 = 0	2.9.4
No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.10	Managed Service SOC	SARS aims to assess the Bidder's solution in terms of completeness, sustainability and viability. Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.	Recruitment and Retention	4: 0% to 10% per year related to this service. 2: 11% to 30% per year related to this service. 0: more than 30% per year related to this service.	4 = 0.37 2 = 0.18 0 = 0	2.10.1
			Capability to operate the managed service in a hybrid SOC ecosystem	4: Five (5) years or more subject matter expertise in seamless integration of the SIEM and the SOAR and Threat Intelligence capability built into the hybrid model. 0: Less than five (5) years' subject matter expertise in seamless integration of the SIEM and the SOAR and Threat Intelligence capability built into the hybrid model.	4 = 1.47 0 = 0	2.10.2
			Evaluation of the effectiveness of the incident detection and remediation efforts via the metrics defined in their proposal	4: MTTD (Mean Time to Detect) less than one hour; MTTR (Mean Time to Respond) within 4 (four) hours; MTTA (Mean Time to Analyse) less than 30 (thirty) minutes; FPR (False Positive Rate) less than 5%; FNR (False Negative Rate) less than 10%.	4 = 1.47 0 = 0	2.10.3

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				0: Metrics less than: MTTD (Mean Time to Detect) less than one (1) hour; MTTR (Mean Time to Respond) within four (4) hours; MTTA (Mean Time to Analyse) less than 30 (thirty) minutes; FPR (False Positive Rate) less than 5%; FNR (False Negative Rate) less than 10%.		
			Qualifications	4: Two (2) or more of key staff has CEH, CCNP Security, CISSP certification. 0: No relevant qualifications.	4 = 0.37 0 = 0	2.10.4
No:	Sub-criterion	Inquiry	Metric	Objective	Inquiry weighting	TRT Reference
2.11	Micro-Segmentation Platform Services	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and whole unit spares holding) Bidders who can show, with substantiation, that the aspects of the services have been provided and align to BRS, SOW and Schedule C (SLAs) will achieve maximum points for this sub-criterion.	Recruitment and Retention	4: 0% to 10% per year related to this service. 2: 11% to 30% per year related to this service. 0: more than 30% per year related to this service.	4 = 0.92 2 = 0.46 0 = 0	2.11.1
			Software integration, architecture, design and support for Cisco ASA, Cisco ISE, ACI, Cisco Secure Workload	4: CCIE Security engineer with five (5) years' experience dedicated to the account. 2: CCNP Security certified engineer with five (5) years' experience dedicated to the account. 0: No relevant experience.	4 = 2.75 2 = 1.38 0 = 0	2.11.2

9.4.5.3 Service Management Solution Criterion (15 Points)

9.4.5.3.1 The evaluation of the Service Management Solution of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column “TRT Reference” in **Table 7.3 Service Management Solution Criterion Evaluation** below.

Table 7.3 Technical Evaluation Criteria - Service Management Solution Criterion (15 Points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
3.1.	Service Management Compliance/Conformance	<p>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 requirements.</p> <p>The Bidder will be evaluated on the following basis:</p> <ul style="list-style-type: none"> 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. 	<p>4: The Bidder has indicated 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 (quantitatively managed or equivalent) or higher.</p> <p>Bidders that provide a Maturity Assessment report as evidence, must adhere to the following requirements:</p> <ul style="list-style-type: none"> 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/CEO or equivalent management level. <p>2. The Bidder has provided a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of 3 (below 4).</p> <p>The following requirements must be met:</p> <ul style="list-style-type: none"> 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 to be produced. 	<p>4 = 9.00</p> <p>2 = 4.50</p> <p>0 = 0</p>	3.1

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<ul style="list-style-type: none"> The report must be signed by the bidder's CFO/CEO or an equivalent management level. <p>0: The Bidder has not demonstrated that the company adheres to a best practice Service Management framework in line with SARS's requirements.</p> <p><i>For bidders with ISO certification, the ISO certification must remain valid for the contract duration.</i></p> <p><i>For Bidders with IT Maturity Assessment Report, the Bidder must produce an annual IT Service Management Maturity Assessment report from an accredited auditor/ assessor, signed by the CFO/CEO or an equivalent management level confirming the maintenance of advanced and optimised IT Service Management processes in line with SARS's requirements.</i></p>		
3.2	Service Management Toolset	<p>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.</p> <p>The Bidder who can give verifiable references to confirm that the toolset used offers enough automation of its service management according to SARS's requirements will get full points for this sub-criterion.</p>	<p>4: The Bidder has demonstrated that their IT Service Management toolset/system is fully automated and well established to meet or surpass all of SARS's requirements and has provided two (2) contactable references, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none"> Incidents Management; Problems Management; Change Management; Configuration Management; Service level Management; Performance and Capacity management; and Service management Reporting. <p>2: The Bidder has demonstrated that their IT Service Management toolset/system is fully automated and well prepared to meet or surpass all of SARS's requirements and has provided one (1) contactable reference, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none"> Incidents Management; Problems Management; Change Management; Configuration Management; Service level Management; 	<p>4 = 6.00</p> <p>2 = 3.00</p> <p>0 = 0</p>	3.2

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<ul style="list-style-type: none"> • Performance and Capacity Management; and • Service Management Reporting. <p>0: The Bidder has not demonstrated that its IT Service Management system is fully automated and well established to meet or surpass all of SARS' functionality needs.</p> <p><i>SARS reserves the right to conduct a due diligence to ensure validity of provided information.</i></p>		

9.4.5.4 Transition Criterion (15 Points)

9.4.5.4.1 The evaluation of the Transition criterion of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column "TRT Reference" in **Table 7.4 Transition Criterion Evaluation** below.

Table 7.4 Technical Evaluation Criteria – Transition Criterion (15 points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
4.1	Transition Team Structure and Experience	<p>SARS aims to assess the Bidder's capability to transition the services effectively. All aspects of the transition team as listed 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.</p> <p>The key inquiry is: Does the Bidder's proposal for Transition as defined in the <u>Business Requirements Specification</u> include a formally defined multidisciplinary Transition team with named and experienced key resources?</p>	<p>4: The Bidder's proposal for a Transition team structure has been formally defined and includes experienced personnel that meet all the following minimum requirements:</p> <ul style="list-style-type: none"> • All team members have experience in transitioning two (2) projects similar in size of SARS. • Summary of individual experience clearly stipulating the roles in the project, minimum qualification/certification based on the areas below and roles of team members in previous/past transitions. • The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: <ul style="list-style-type: none"> ○ Transition Management; ○ Project Management/Programme Management; ○ Vendor and Contract Management; ○ IT Service Management; and ○ Technical Subject Matter Experts. <p>2: The Bidder's proposal for a Transition team structure has been formally defined and includes personnel that meet all the following minimum requirements:</p> <ul style="list-style-type: none"> • Each team member has experience in transitioning one (1) project similar in size as SARS. • The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: <ul style="list-style-type: none"> ○ Transition Management; ○ Project Management/Programme Management; ○ Vendor and Contract Management; ○ IT Service Management; and ○ Technical Subject Matter Experts. 	<p>4 = 6.00</p> <p>2 = 3.00</p> <p>0 = 0</p>	4.1

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<p>0: The Bidder's proposal for a Transition team structure does not meet SARS's minimum requirements.</p> <p>The Bidder may provide additional areas of expertise over and above the minimum requirements, in relation to the teams' experience, which they deem key to a successful transition process.</p>		
4.2	Transition Plan	<p>SARS aims to assess the Bidder's proposal for transitioning the services effectively. All requirements for Transitioning in the <u>Business Requirements Specification</u>, the <u>Agreement</u> and the <u>RFP Main Document</u> must be included in the scope of the project, including the plan to meet the required timelines.</p> <p>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.</p>	<p>4: The Bidder's proposal for a transition plan contains the following minimum requirements for a successful transition project as outlined below:</p> <ul style="list-style-type: none"> • Include a Gantt chart of activities, showing milestones, resourcing, and timing of each activity; • Clearly stipulated stages of the transition project (e.g., Initiation, Planning, Execution, Monitoring, Closure); • The project schedule with scope, timelines, dependencies, milestones, deliverables, based on the services provided in Tower N and showing a maximum transition period of three (3) months; • Defined Roles and Responsibilities (between SARS, outgoing service provider, incoming service provider); • Stakeholder Engagement and Communication; • Risk Management; • Deployment and migration approach; • Training and Knowledge Transfer; • Quality assurance; • Post-Transition Support and Optimisation; and • Transition approach- Specify how downtime and disruptions will be minimised during the transition. <p>0: The Bidder's proposal for a transition plan does not meet SARS's minimum requirements for a successful transition project.</p>	<p>4 = 9.00</p> <p>0 = 0</p>	4.2

9.4.6 Technical Evaluation Criteria for Tower S

Table 8: Technical Evaluation Criteria Point allocation (Tower S).

Criterion	Description	Weighting for Tower S	Evaluation values
Capability	Bidder's track record and current supported customer base, skills.	20	Maximum points towards this criterion will be achieved by the Bidder who can demonstrate proof of a sustainable business, demonstrate proof of sufficient resources, its representation in areas throughout the Republic that will adequately support SARS's Sites.
Solution	Bidder's solution meets or exceeds the service requirements.	45	Maximum points towards this criterion will be achieved by the Bidder(s) whose solution meets all aspect of the Service specifications.
Service Management	Bidder's ability to provide service management requirements in terms of this RFP.	20	Maximum points towards this criterion will be achieved by the Bidder(s) whose Proposal contains a solution that meets all aspects of the service management scope set out in this RFP.
Transition	The Bidder's proposal to transition current provider(s) to the Bidder's proposed solution and the Bidder's proposal to manage risk and quality.	15	A Proposal that demonstrates a complete plan for Transition of all the in-scope Services at minimal or no risk together with a comprehensive risk and quality management approach will achieve maximum points.
Total for Functionality		100	

9.4.6.1 Capability Criterion (20 Points)

- 9.4.6.1.1 The evaluation of the Capability criterion of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column "TRT Reference" in **Table 8.1 Capability Criterion Evaluation** below.

Table 8.1: Technical evaluation criteria for Tower S

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference								
1.1.	Subcontractor Dependency ≤40%	<p>SARS seeks to establish the extent to which the Bidder relies 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.</p> <p>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 service delivery will achieve maximum points for this criterion.</p> <p>Documentation must be attached by the Bidder to substantiate its claims to achieve maximum points.</p> <p>Does the Bidder have established/formal subcontracting agreements with its proposed subcontractors; and does the extent of its reliance on subcontractors pose any risk to SARS?</p> <table><tr><th>% of sub-contracting</th><th>Risk Level</th></tr><tr><td>≤ 29%</td><td>Low</td></tr><tr><td>30- 40 %</td><td>Medium</td></tr><tr><td>< 41 %</td><td>High</td></tr></table>	% of sub-contracting	Risk Level	≤ 29%	Low	30- 40 %	Medium	< 41 %	High	<p>4: Most elements of the scope are currently delivered by the Bidder and low risk of ≤29% of the total contract value is placed on subcontractor(s), which are formally proposed and contracted.</p> <p>2: Few elements of the scope are currently delivered by the Bidder and medium risk of ≈30-40% of the total contract value is placed on subcontractor(s), which are formally proposed and contracted.</p> <p>0: Less elements of the scope are currently delivered by the Bidder and ≥ 40% of the total contract value is placed on subcontractors for which evidence has or not been provided as the formality of the engagement. The elements of scope subcontracted are assessed to be high risk.</p> <p><i>Notes: Total (Sum) of the percentages of all Key Services as per the Technical Response Template Table A under point 1.1 will provide the percentage for scope evaluation. The Percentage of Formal vs Informal agreements will be used as the measure for contracting</i></p>	4 = 4.00 2 = 2.00 0 = 0	1.1
% of sub-contracting	Risk Level												
≤ 29%	Low												
30- 40 %	Medium												
< 41 %	High												
No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference								
1.2.	Service Centres	<p>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.</p> <p>Bidders who can show that its existing Service Centres have sufficient coverage of required skills</p>	<p>4: The Bidder's service centres are all located within the maximum distance from SARS key (strategic) Offices, and they are all staffed with the required number of skilled professionals. This setup ensures optimal service delivery and adherence to service levels.</p> <p>3: While the Bidder's service centres are generally well-positioned (between 90% to 99% of the service centres are within the maximum</p>	4 = 2.67 3 = 2.00 2 = 1.33 1 = 0.67	1.2								

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines			Inquiry weighting	TRT Reference
		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.	<p>distance from key SARS offices) and staffed (between 90% and 99% of the number of skills available match the skills required), there are isolated instances where the proximity or skill availability could be improved. Overall, these gaps do not significantly impact service delivery or meeting service levels.</p> <p>2: The Bidder's service centres show some gaps in either skills (between 80% and 90% of the number of skills available match the skills required) or location coverage (between 80% to 90% of the service centres are within the maximum distance from key SARS offices), which could potentially affect service delivery efficiency. There is a need for improvements to better meet service levels.</p> <p>1: The Bidder's coverage in terms of location (between 70% to 80% of the service centres are within the maximum distance from key SARS offices and skills (between 70% and 80% of the number of skills available match the skills required), posing challenges in delivering services effectively and meeting service levels. Significant improvements are required.</p> <p>0: The Bidder's service centres are poorly located (less than 70% of the service centres are within the maximum distance from key SARS offices and lack essential skills (less than 70% of the number of skills available match the skills required), severely impacting the ability to deliver services and meet service levels effectively.</p>			0 = 0	
No:	Sub-criterion	Inquiry	Specific evaluation guidelines			Inquiry weighting	TRT Reference
1.3.	Skills Available to SARS	<p>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 and centres within Gauteng.</p> <p>A Bidder who can show sufficient coverage of all technical skills categories available for projects in Gauteng will be eligible for maximum points for this sub-criterion.</p>	<p>4: The Bidder has presented the minimum number of skills required per skill level.</p> <p>2: The Bidder has met the minimum number of skills required per skill level.</p> <p>0: The Bidder has not presented the minimum</p>	Skill	Minimum number of skills required	Weight	TRT Reference
				CompTia Server plus; MCP (Microsoft Certified Product – Server) qualification, Microsoft Azure Cloud certification and at least two (2) years' experience	4	<p>4 = 2.67</p> <p>2= 1.33</p> <p>0 = 0</p>	1.3.1

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines			Inquiry weighting	TRT Reference
			number of skills required per skill level.	OEM certification on servers, blades, and at least two (2) years' experience.	4	4 = 2.67 2 = 1.33 0 = 0	1.3.2
				Project Management Certification and at least five (5) years' experience.	2	4 = 2.67 2 = 1.33 0 = 0	1.3.3
1.4	Proximity of Service Centres to SARS Sites	<p>SARS aims to establish the distribution of capabilities that the Bidder (and its subcontractors) will be able to bring to bear in delivering services to meet the Service Levels.</p> <p>The Bidder's capability (including the capability of its subcontractors) as evidenced by its response to provide services to SARS sites from Service Centres within the performance standards set out in the RFP will score maximum points for this sub-criterion.</p>	<p>4: The ability of the Bidder to respond in less than the required Time to Respond at all sites.</p> <p>3: The ability of the Bidder to respond within the required Time to Respond at 90% to 99% of all sites.</p> <p>2: The ability of the Bidder to respond within the required Time to Respond at least 80% to 89% of all sites.</p> <p>1: The ability of the Bidder to respond within the required Time to Respond at least 70% to 79% of all sites.</p> <p>0: The ability of the Bidder to respond within the required Time to Respond at less than 70% of all sites.</p> <p>Note to Bidder: The distance and time given must assume a reasonable speed or 100 km travel in 1 hour.</p>			4 = 5.32 3 = 4.00 2 = 2.67 1 = 1.33 0 = 0	1.4

9.4.6.2 **Technical Solution Criterion** (45 points)

9.4.6.2.1 The evaluation of the Solution of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column “TRT Reference” in **Table 8.2 Solution Criterion Evaluation** below.

Table 8.2 Technical Solution Criterion (45 points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
			Metric	Objective		
2.1	Server Computing Devices	<p>SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and parts holding) Bidders who can show, with substantiation, that the aspects of the services have been provided and align to SARS RFP 03-2024 Business Requirement Specification will achieve maximum points for this sub-criterion.</p> <p>Note: The Bidder has shown, with substantiation, the staff turnover %, and that they are certified to do in warranty repairs on Dell servers and that they do all of warranty repairs onsite, and that they commit to carry parts (In and out of Warranty) for Dell as per the break fix ratio, and that they have certified partnerships with OEMs (Dell and Microsoft).</p>	Recruitment and retention as per 12 (twelve)-month period	<p>4: 0% to 10% turnover</p> <p>2: 11% to 30%</p> <p>0: more than 30%</p>	<p>4 = 11.25</p> <p>2 = 5.63</p> <p>0 = 0</p>	2.1.1
			Warranty provider status	<p>4: OEM certification for Dell servers and Microsoft Server</p> <p>0: OEM certification for only Dell servers (Or less)</p>	<p>4 = 7.50</p> <p>0 = 0</p>	2.1.2
			Out of warranty repair and repairs done by third party	<p>4: Repairs done 100% onsite</p> <p>0: No out of warranty repairs are done</p>	<p>4 = 3.75</p> <p>0 = 0</p>	2.1.3
			Parts	<p>4: Carry Parts for both in and out of warranty devices for Dell OEM</p> <p>2: Carry Parts for only in warranty devices for Dell OEMs</p>	<p>4 = 7.50</p> <p>2 = 3.75</p> <p>0 = 0</p>	2.1.4

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				0: No commitment to carry parts for in warranty devices for Dell OEM		
No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry Weighting	TRT Reference
2.2	Server Peripherals	<p>SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment and retention), viability (dependence on third parties, OEM relationship, warranty services and parts holding) and risk to SARS of any weaknesses.</p> <p>Bidders who can show, with substantiation, that the aspects of the services have been provided for appropriately and present little or low risk to SARS will achieve maximum points for this sub-criterion.</p>	Metric	Objective	4 = 5.00 0 = 0	2.2.1
			Warranty provider status	<p>4: OEM certification for Dell servers and Microsoft Server</p> <p>0: OEM certification for only Dell servers (Or less)</p>		
			Out of warranty repair and repairs done by third party	<p>4: Repairs done 100% onsite</p> <p>0: No out of warranty repairs are done</p>	4 = 5.00 0 = 0	2.2.2
			Parts	<p>4: Carry Parts for both in and out of warranty devices for Dell OEM</p> <p>2: Carry Parts for only in warranty devices for Dell OEM</p> <p>0: No commitment to carry parts for in warranty devices for Dell OEM</p>	4 = 5.00 2 = 2.50 0 = 0	2.2.3

9.4.6.3 Service Management Solution Criterion (20 Points)

9.4.6.3.1 The evaluation of the Service Management Solution of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column “TRT Reference” in **Table 8.3 Service Management Solution Criterion Evaluation** below.

Table 8.3 Service Management Solution Criterion (20 Points):

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
3.1.	Service Management Compliance/Conformance	<p>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 requirements.</p> <p>The Bidder will be evaluated on the following basis:</p> <ul style="list-style-type: none"> 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. 	<p>4: The Bidder has indicated 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 (quantitatively managed or equivalent) or higher.</p> <p>Bidders that provide a Maturity Assessment report as evidence, must adhere to the following requirements:</p> <ul style="list-style-type: none"> 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/ CEO or equivalent management level. <p>2: The Bidder has provided a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of 3 (below 4).</p> <p>The following requirements must be met:</p> <ul style="list-style-type: none"> 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 to be produced. 	<p>4 = 10.00</p> <p>2 = 5.00</p> <p>0 = 0</p>	3.1

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<ul style="list-style-type: none"> The report must be signed by the bidder's CFO/CEO equivalent management level. <p>0: The Bidder has not demonstrated that the company adheres to a best practice Service Management framework in line with SARS's requirements.</p> <p>For Bidders with ISO certification, the ISO certification must remain valid for the contract duration.</p> <p>For Bidders with IT Maturity Assessment Report, the Bidder must produce an annual IT Service Management Maturity Assessment report from an accredited auditor/ assessor, signed by the CFO/CEO or equivalent management level confirming the maintenance of advanced and optimised IT Service Management processes in line with SARS's requirements.</p>		
3.2.	Service Management Toolset	<p>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.</p> <p>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.</p>	<p>4: The Bidder has demonstrated that their IT Service Management toolset/system is fully automated and well established to meet or surpass all of SARS's requirements and has provided two (2) contactable references, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none"> Incidents Management; Problems Management; Change Management; Configuration Management; Service level Management; Performance and Capacity management; and Service management Reporting. <p>2: The Bidder has demonstrated that their IT Service Management toolset/system is fully automated and well prepared to meet or surpass all of SARS's requirements and has provided one (1) contactable reference, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none"> Incidents Management; Problems Management; Change Management; 	<p>4 = 10.00</p> <p>2 = 5.00</p> <p>0 = 0</p>	10

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<ul style="list-style-type: none"> • Configuration Management; • Service level Management; • Performance and Capacity Management; and • Service Management Reporting. <p>0: The Bidder has not demonstrated that its IT Service Management system is fully automated and well established to meet or surpass all of SARS's functionality needs</p> <p>SARS reserves the right to conduct a due diligence to ensure validity of provided information.</p>		

Transition Criterion (15 Points)

9.4.6.3.2 The evaluation of the Transition criterion of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column “TRT Reference” in **Table 8.4 Transition Criterion Evaluation** below.

Table 8.4 Technical Evaluation Criteria – Transition Criterion (15 points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighti ng	TRT Referen ce
4.1.	Transition Team Structure and Experience	<p>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.</p> <p>The key inquiry is: Does the Bidder's proposal for Transition as defined in the <u>Business Requirements Specification</u> include a formally defined multidisciplinary Transition team with named and experienced key resources?</p>	<p>4: The Bidder's proposal for a Transition team structure has been formally defined and includes experienced personnel that meet all the following minimum requirements:</p> <ul style="list-style-type: none"> • All team members have experience in transitioning two (2) projects similar in size of SARS. • Summary of individual experience clearly stipulating the roles in the project, minimum qualification/certification based on the areas below and roles of team members in previous/past transitions. • The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: <ul style="list-style-type: none"> ○ Transition Management; ○ Project Management/Programme Management; ○ Vendor and Contract Management; ○ IT Service Management; and ○ Technical Subject Matter Experts. <p>2: The Bidder's proposal for a Transition team structure has been formally defined and includes personnel that meet all of the following minimum requirements: Each team member has experience in transitioning one (1) project similar in size as SARS.</p> <ul style="list-style-type: none"> • The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: <ul style="list-style-type: none"> ○ Transition Management; ○ Project Management/Programme Management; ○ Vendor and Contract Management; ○ IT Service Management; and ○ Technical Subject Matter Experts. 	<p>4 = 9.00</p> <p>2 = 4.50</p> <p>0 = 0</p>	4.1

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<p>0: The Bidder's proposal for a Transition team structure does not meet SARS's minimum requirements.</p> <p>The Bidder may provide additional areas of expertise over and above the minimum requirements, in relation to the teams' experience, which they deem key to a successful transition process.</p>		
4.2.	Transition Plan	<p>SARS aims to assess the Bidder's proposal for transitioning the services effectively. All requirements for Transitioning in the <u>Business Requirements Specification</u>, the <u>Agreement</u> and the <u>RFP Main Document</u> must be included in the scope of the project, including the plan to meet the required timelines.</p> <p>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.</p>	<p>4: The Bidder's proposal for a transition plan contains the following minimum requirements for a successful transition project as outlined below:</p> <ul style="list-style-type: none"> • Include a Gantt chart of activities, showing milestones, resourcing, and timing of each activity; • Clearly stipulated stages of the transition project (e.g., Initiation, Planning, Execution, Monitoring, Closure) • The project schedule with scope, timelines, dependencies, milestones, deliverables, based on the services provided in Tower S and showing a maximum transition period of three (3) months. • Defined Roles and Responsibilities (between SARS, outgoing service provider, incoming service provider); • Stakeholder Engagement and Communication; • Risk Management; • Deployment and migration approach; • Training and Knowledge Transfer; • Quality assurance; • Post-Transition Support and Optimisation; and • Transition approach- Specify how downtime and disruptions will be minimised during the transition. <p>0: The Bidder's proposal for a transition plan does not meet SARS's minimum requirements for a successful transition project.</p>	<p>4 = 6.00</p> <p>0 = 0</p>	4.2

9.4.7 Technical Evaluation Criteria for Tower E

Table 9: Technical Evaluation Criteria point allocation (Tower E)

Criterion	Description	Weighting for Tower E	Evaluation values
Capability	Bidder's track record and current supported customer base, skills.	20	Maximum points towards this criterion will be achieved by the Bidder who can demonstrate proof of a sustainable business, demonstrate proof of sufficient resources, its representation in areas throughout the Republic that will adequately support SARS's Sites.
Solution	Bidder's solution meets or exceeds the service requirements.	45	Maximum points towards this criterion will be achieved by the Bidder(s) whose solution meets all aspect of the Service specifications.
Service Management	Bidder's ability to provide service management requirements in terms of this RFP.	20	Maximum points towards this criterion will be achieved by the Bidder(s) whose Proposal contains a solution that meets all aspects of the service management scope set out in this RFP.
Transition	The Bidder's proposal to transition current provider(s) to the Bidder's proposed solution and the Bidder's proposal to manage risk and quality.	15	A Proposal that demonstrates a complete plan for Transition of all the in-scope Services at minimal or no risk together with a comprehensive risk and quality management approach will achieve maximum points.
Total for Functionality		100	

9.4.7.1 Capability Criterion (20 Points)

- 9.4.7.1.1 The evaluation of the Capability criterion of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column "TRT Reference" in **Table 9.1 Capability Criterion Evaluation** below.

Table 9.1: Technical evaluation criteria for Tower E (20 Points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference										
1.1.	Subcontractor Dependency ≤40%	<p>SARS seeks to establish the extent to which the Bidder relies 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.</p> <p>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 service delivery will achieve maximum points for this criterion.</p> <p>Documentation must be attached by the Bidder to substantiate its claims to achieve maximum points.</p> <p>Does the Bidder have established/formal subcontracting agreements with its proposed subcontractors; and does the extent of its reliance on subcontractors pose any risk to SARS?</p> <table><tr><th>% of sub-contracting</th><th>Risk Level</th></tr><tr><td>≤ 29%</td><td>Low</td></tr><tr><td>30- 40 %</td><td>Medium</td></tr><tr><td>< 41 %</td><td>High</td></tr><tr><td>.</td><td></td></tr></table>	% of sub-contracting	Risk Level	≤ 29%	Low	30- 40 %	Medium	< 41 %	High	.		<p>4: Most elements of the scope are currently delivered by the Bidder and low risk of ≤29% of the total contract value is placed on subcontractor(s), which are formally proposed and contracted.</p> <p>2: Few elements of the scope are currently delivered by the Bidder and medium risk of ≈30-40% of the total contract value is placed on subcontractor(s), which are formally proposed and contracted.</p> <p>0: Less elements of the scope are currently delivered by the Bidder and ≥40% of the total contract value is placed on subcontractors for which evidence has or not been provided as the formality of the engagement. The elements of scope subcontracted are assessed to be high risk.</p> <p><i>Note to Bidder: Warehouse and Equipment Transport Services are expected to be outsourced to subcontractors and forms part of the above percentages</i></p>	4 = 4.05 2 = 2.03 0 = 0	1.1
% of sub-contracting	Risk Level														
≤ 29%	Low														
30- 40 %	Medium														
< 41 %	High														
.															
1.2	Service Centres	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.	4: The Bidder's service centres are all located within the maximum distance from SARS key (strategic) Offices, and they have required number of skilled professionals.	4 = 5.41 3 = 4.05	1.2										

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
		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.	<p>3: While the Bidder's service centres are generally well-positioned (between 90% to 99% of the service centres are within the maximum distance from key SARS offices) and staffed (between 90% and 99% of the number of skills available match the skills required), there are isolated instances where the proximity or skill availability could be improved.</p> <p>2: The Bidder's service centres show some gaps in either skills (between 80% and 90% of the number of skills available match the skills required) or location coverage (between 80% to 90% of the service centres are within the maximum distance from key SARS offices), which could potentially affect service delivery efficiency.</p> <p>1: The Bidder's service centres lack sufficient coverage in terms of location (between 70% to 80% of the service centres are within the maximum distance from key SARS offices and skills (between 70% and 80% of the number of skills available match the skills required), posing challenges in delivering services effectively and meeting service levels.</p> <p>0: The Bidder's service centres are poorly located (less than 70% of the service centres are within the maximum distance from key SARS offices and lack essential skills (less than 70% of the number of skills available match the skills required), or the Bidder has not attached proof of residence (Utility bills or Lease agreements) for all sites. severely impacting the ability to deliver services and meet service levels effectively.</p>	<p>2 = 2.70</p> <p>1 = 1.35</p> <p>0 = 0</p>	

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Weight	TRT Reference
			Skill	Minimum number of skills required		
1.3.	Skills available to SARS	SARS aims to establish the depth of skills that the Bidder (including its subcontractors) will be able to offer to SARS, required for the Bidder to meet the SLA required on all services, if required by SARS, for projects/assignments run from SARS's head office and centres within Gauteng.	4: The Bidder has exceeded the minimum number of skills required per skill level at one or more regions.			
			2: The Bidder has successfully shown that it meets the minimum number of skills required per skill level for each region.			
			0: The Bidder fails to meet the minimum required skills per skill level in one or more regions.			
			Gauteng			
			A+ and OEM certification with at least two (2) years' experience (End-user Computing Devices)	10	4 = 0.27 2 = 0.14 0 = 0	1.3.1
			OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.2
			Project Management Certification and at least five (5) years' experience.	2	4 = 0.27 2 = 0.14 0 = 0	1.3.3
			North West			
			A+ and OEM certification with at least two (2) years' experience. (End-user Computing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.4
			OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.5
KwaZulu-Natal						
A+ and OEM certification with at least two (2) years' experience. (End-user Computing Devices)	4	4 = 0.27 2 = 0.14 0 = 0	1.3.6			

			OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.7
			Limpopo			
			A+ and OEM certification with at least two (2) years' experience. (End-user Computing Devices)	4	4 = 0.27 2 = 0.14 0 = 0	1.3.8
			OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.9
			Mpumalanga			
			A+ and OEM certification with at least two (2) years' experience. (End-user Computing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.10
			OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.11
			Western Cape			
			A+ and OEM certification with at least two (2) years' experience. (End-user Computing Devices)	4	4 = 0.27 2 = 0.14 0 = 0	1.3.12
			OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.13

				Eastern Cape			
				A+ and OEM certification with at least two (2) years' experience. (End-user Computing Devices)	4	4 = 0.27 2 = 0.14 0 = 0	1.3.14
				OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.15
				Northern Cape			
				A+ and OEM certification with at least two (2) years' experience. (End-user Computing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.16
				OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.17
				Free State			
				A+ and OEM certification with at least two (2) years' experience. (End-user Computing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.18
				OEM certification and at least two (2) years' experience. (Multifunction Printing Devices)	2	4 = 0.27 2 = 0.14 0 = 0	1.3.19

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1.4	Proximity of Service Provider's presence to SARS Sites	<p>SARS aims to establish the distribution of capabilities that the Bidder (and its subcontractors) will be able to deliver services to meet the Service Levels.</p> <p>The Bidder's capability (including the capability of its subcontractors) as evidenced by its response to provide services to SARS sites within the performance standards set out in the RFP will score maximum points for this sub-criterion.</p>	<p>4: The ability of the Bidder to respond in less than the required Time to Respond at all sites (100% of the sites)</p> <p>3: The ability of the Bidder to respond within the required Time to Respond at 90% to 99% of all sites.</p> <p>2: The ability of the Bidder to respond within the required Time to Respond at least 80% to 89% of all sites.</p> <p>1: The ability of the Bidder to respond within the required Time to Respond at least 70% to 79 of all sites</p> <p>0: The ability of the Bidder to respond within the required Time to Respond at less than 70% of all sites</p> <p><i>Note to Bidder: The distance and time given must assume a reasonable speed or 100 km travel in 1 hour.</i></p>	<p>4 = 5.41</p> <p>3 = 4.05</p> <p>2 = 2.70</p> <p>1 = 1.35</p> <p>0 = 0</p>	1.4
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9.4.7.2 Technical Solution Criterion (45 points)

9.4.7.2.1 The evaluation of the Solution of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column “TRT Reference” in **Table 9.2 Solution Criterion Evaluation** below.

Table 9.2 Solution Criterion Evaluation (45 points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
			Metric	Objective		
2.1	End-user Computer Devices (Wintel)	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties, OEM relationship, warranty services and Whole Unit Spares holding). Bidders who can show, with substantiation, that the aspects of the services have been provided and align to SARS RFP 03-2024 Business Requirement Specification will achieve maximum points for this sub-criterion.	Recruitment and retention	4: 0% to 10% annual attrition rate 2: 11% to 30% annual attrition rate 0: more than 30% annual attrition rate	4 = 1.50 2 = 0.75 0 = 0	2.1.1
			Warranty provider status	4: Certified for both Dell and Lenovo 0: Certified for only one of the OEMs (Or less)	4 = 6.00 0 = 0	2.1.2
			Out of warranty repair and repairs done by third party	4: Repairs done 100% in house 2: Repairs done via partial subcontracting 0: No out of warranty repairs are done	4 = 0.60 2 = 0.30 0 = 0	2.1.3
			Parts/Whole Unit Spares Holding	4: Carry Whole unit Spares and Parts for both in and out of warranty devices for both OEM's 2: Carry Whole unit Spares and Parts for only in warranty devices for both OEM's 0: No commitment to carry Whole unit spares and parts for in warranty devices for both OEMs	4 = 6.00 2 = 3.00 0 = 0	2.1.4

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			OEM relationship	4: Certified partner both Dell and Lenovo 2: Certified partner with one OEM 0: no partnership with either Dell or Lenovo	4 = 0.90 2 = 0.45 0 = 0	2.1.5
No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
2.2	End-user Computer Devices (Apple)	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment and retention), viability (dependence on third parties, OEM relationship, warranty services and Whole Unit Spares holding). Bidders who can show, with substantiation, that the aspects of the services have been provided and align to SARS RFP 03-2024 Business Requirement Specification will achieve maximum points for this sub-criterion.	Metric	Objective		
			Recruitment and retention	4: 0% to 10% annual attrition rate 2: 11% to 30% annual attrition rate 0: more than 30% annual attrition rate	4 = 0.27 2 = 0.14 0 = 0	2.2.1
			Warranty provider status	4: Certified to do in warranty repairs on Apple Devices 0: Not certified to do in warranty repairs on Apple Devices	4 = 1.09 0 = 0	2.2.2
			Out of warranty repair and repairs done by third party	4: Repairs done 100% in house 2: Repairs done via partial subcontracting (0: No out of warranty repairs are done	4 = 0.27 2 = 0.14 0 = 0	2.2.3
			Parts/Whole Unit Spares Holding	4: Carry Whole Unit Spares and Parts for Apple devices for in and out of warranty devices 2: Carry Whole Unit Spares and Parts for only in warranty devices for Apple devices (0: No commitment to carry Whole Unit spares and parts for in warranty devices for Apple devices	4 = 0.82 2 = 0.41 0 = 0	2.2.4
			OEM relationship	4: Certified partnership with Apple 0: No partnership with Apple	4 = 0.55 0 = 0	2.2.5

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
2.3	End-user Computer Devices (Android)	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment and retention), viability (dependence on third parties, OEM relationship, warranty services and whole unit spares holding). Bidders who can show, with substantiation, that the aspects of the services have been provided and align to SARS RFP 03-2024 Business Requirement Specification will achieve maximum points for this sub-criterion.	Metric	Objective		
			Recruitment and retention	4: 0% to 10% annual attrition rate	4 = 1.50	2.3.1
				2: 11% to 30% annual attrition rate	2 = 0.75	
				0: more than 30% annual attrition rate	0 = 0	
			Warranty provider status	4: Certified to do in warranty repairs on Samsung Devices	4 = 3.00	2.3.2
			0: Not certified to do in warranty repairs on Samsung Devices	0 = 0		
Out of warranty repair and repairs done by third party	4: Repairs done 100% in house	4 = 0.60	2.3.3			
	2: Repairs done via partial or full subcontracting	2 = 0.30				
	0: No out of warranty repairs are done	0 = 0				
Whole Unit Spares Holding	4: Carry Whole unit Spares for Samsung devices for in and out of warranty devices	4 = 3.00	2.3.4			
	2: Carry Whole unit Spares for only in warranty devices for Samsung devices	2 = 1.50				
	0: no commitment to carry Whole unit spares for in warranty devices for Samsung devices	0 = 0				
OEM relationship	4: Certified partnership with Samsung	4 = 0.90	2.3.5			
	0: no partnership with Samsung	0 = 0				
No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
2.4	Display Devices	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment and retention), viability (dependence on third parties, OEM relationship, warranty services and Whole Unit Spares holding) and risk to SARS of any weaknesses.	Metric	Objective		
			Recruitment and retention	4: 0% to 10% annual attrition rate	4 = 1.20	2.4.1
				2: 11% to 30% annual attrition rate	2 = 0.60	
0: More than 30% annual attrition rate	0 = 0					
Warranty provider status	4: Certified for both Dell and Lenovo	4 = 0.60	2.4.2			
	2: Certified in only one of the OEMs (Or less)					

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		Bidders who can show, with substantiation, that the aspects of the services have been provided for appropriately and present little or low risk to SARS will achieve maximum points for this sub-criterion.		0: Not Certified for both Dell and Lenovo	2 = 0.30 0 = 0	
			Whole Unit Spares Holding	4: Carry Whole Unit Spares for both in and out of warranty devices for both OEM's 2: Carry Whole Unit Spares for only in warranty devices for both OEMs 0: No commitment to carry whole unit spares for in warranty devices for both OEMs	4 = 0.60 2 = 0.30 0 = 0	2.4.3
			OEM relationship	4: Certified partner both Dell and Lenovo 2: Certified partner with one OEM 0: No partnership with either Dell or Lenovo	4 = 0.60 2 = 0.30 0 = 0	2.4.4
No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
2.5	Input devices	SARS aims to assess the Bidder's solution in terms of completeness, sustainability (recruitment, and retention), viability (dependence on third parties) and risk to SARS of any weaknesses. Bidders who can show, with substantiation, that the aspects of the services have been provided for appropriately and present little or low risk to SARS will achieve maximum points for this sub-criterion	4: The Bidder has shown, with substantiation, that the attrition rate is 0% to 10% per annum, and that they do all break fix assessments and attempted operationalisation for devices in house. 2: The Bidder has shown, with substantiation, that the attrition rate is 11% to 30% per annum, or that they do all break fix assessments and attempted operationalisation for devices is via a third party. 0: The Bidder has shown, with substantiation, that the attrition rate is over 30% per annum, or that they do not do input device assessments and attempted operationalisation at all.		4 = 3.00 2 = 1.50 0 = 0	2.5
No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
2.6	Printing Devices	SARS aims to assess the Bidder's solution in terms of completeness, support staff, viability (dependence on third parties, OEM relationship), and risk to SARS of any weaknesses.	Metric	Objective		
			Staff Turnover % per annum	4: 0% to 10% attrition rate 2: 11% to 30% attrition rate	4 = 1.50 2 = 0.75	2.6.1

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		Bidders who can show, with substantiation, that the aspects of the services have been provided for appropriately and present little or low risk to SARS will achieve maximum points for this sub-criterion.		0: More than 30% attrition rate	0 = 0	
			Certified to do in warranty repairs	4: All listed brands Currently in house or Future in-house or via a third party 0: No Support can be done on all the listed brands	4 = 3.00 0 = 0.00	2.6.2
			Capability to do out of warranty devices	4: 100% in house 2: Partial subcontracting 0: No out of warranty repairs	4 = 0.60 2 = 0.30 0 = 0	2.6.3
			Commit to carry spares and parts (In and out of Warranty) for listed brands as per the break fix ratio	4: Parts (In and out of warranty) and Whole Unit Spares carried in house for all listed brands 3: Parts (In warranty) and Whole Unit Spares carried in house for all listed brands 2: Parts (In warranty) and Whole Unit Spares carried either in house or via third party for all listed brands 1: Parts (In warranty) and Whole Unit Spares carried either in house or via third party for 80% of all listed brands 0: No commitment to carry spares and parts for in warranty devices for any listed brands	4 = 6.00 3 = 4.50 2 = 3.00 1 = 1.50 0 = 0	2.6.4
			OEM relationship	4: Certified partner on all listed brands 3: Certified partner on 80% to 99% of the listed brands 2: Certified partner on 60% to 79% of the listed brands 1: Certified partner on 40% to 59% of the listed brands 0: No partnership with any of the listed brands	4 = 0.90 3 = 0.68 2 = 0.45 1 = 0.23 0 = 0	2.6.5

9.4.7.3 Service Management Solution Criterion (20 points)

9.4.7.3.1 The evaluation of the Service Management Solution of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column “TRT Reference” in **Table 9.3 Service Management Solution Criterion Evaluation** below.

Table 9.3 Service Management Solution Criterion Evaluation (20 points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
3.1	Service Management Compliance/Conformance	<p>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 requirements.</p> <p>The Bidder will be evaluated on the following basis:</p> <ul style="list-style-type: none"> 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 Level of 4 or higher will attain the maximum score. 	<p>4: The Bidder has indicated that its 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 Level of 4 (quantitatively managed or equivalent) or higher.</p> <p>Bidders that provide a Maturity Assessment report as evidence, must adhere to the following requirements:</p> <ul style="list-style-type: none"> 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 provided report must be signed by the Bidder's CFO/CEO or equivalent management level. <p>2. The Bidder has provided a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity Level of 3 (below 4).</p> <p>The following requirements must be met:</p> <ul style="list-style-type: none"> 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 to be produced. 	<p>4 = 8.89</p> <p>2 = 4.44</p> <p>0 = 0</p>	3.1

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<ul style="list-style-type: none"> The report must be signed by the Bidder's CFO/CEO or equivalent management level. <p>0: The Bidder has not demonstrated that the company adheres to a best practice Service Management framework in line with SARS's requirements or has scored an organisational Maturity Level ranging from 0 to 2.9.</p> <p>For Bidders with ISO certification, the ISO certification must remain valid for the duration of the contract.</p> <p>For Bidders with IT Maturity Assessment Report, the Bidder must produce an annual IT Service Management Maturity Assessment report from an accredited auditor/assessor, signed by the CFO/CEO or equivalent management level confirming the maintenance of advanced and optimised IT Service Management processes in line with SARS's requirements.</p>		
3.2	Service Management Toolset	<p>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.</p> <p>The Bidder who can give verifiable references to confirm that the toolset used offers enough automation of its service management according to SARS's requirements will get full points for this sub-criterion.</p>	<p>4: The Bidder has demonstrated that their IT Service Management toolset/system is fully automated and well established to meet or surpass all of SARS' requirements and have provided two (2) contactable references, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none"> Incidents Management; Problems Management; Change Management; Release Management; Configuration Management; Service level Management; Performance and Capacity management; and Service management Reporting. <p>2: The Bidder has demonstrated that their IT Service Management toolset/system is fully automated and well prepared to meet or surpass all of SARS' requirements and have provided one (1) contactable reference, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none"> Incidents Management; Problems Management; Change Management; Configuration Management; Release Management; Service level Management; 	<p>4 = 6.67</p> <p>2 = 3.33</p> <p>0 = 0</p>	3.2

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No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<ul style="list-style-type: none"> Performance and Capacity Management; and Service Management Reporting. <p>0: The Bidder has not demonstrated that their IT Service Management system is fully automated and well established to meet or surpass all of SARS's functionality needs.</p> <p>SARS reserves the right to conduct a due diligence to ensure validity of provided information.</p>		
3.3	Solution for Warehouse Management portal	<p>Does the Bidder's solution for Warehouse Management portal meet SARS's business requirement specification?</p> <p>All four (4) criterion are required in solution:</p> <ol style="list-style-type: none"> 1) Inventory Management 2) User Management and Access Control 3) Scalability and Flexibility 4) Reporting and Analytics 	<p>4: The Bidder has shown a current solution or a clear and committed plan to deliver the functionality required. (All 4 criteria are provided in solution)</p> <p>2: The Bidder has shown a current solution or a clear and committed plan to deliver critical functionality required (Inventory Management, Reporting and Analytics) functions.</p> <p>0: The Bidder's solution does not meet SARS's requirements. This could also apply in the case of an uncommitted plan to deliver the required functionality (Bidder is unable to meet all critical criteria: Inventory Management, Reporting and Analytics)</p>	<p>4 = 4.44</p> <p>2 = 2.22</p> <p>0 = 0</p>	3.3

9.4.7.4 Transition Criterion (15 Points)

9.4.7.4.1 The evaluation of the Transition criterion of a Proposal consists of an evaluation of the sub-criteria / Inquiries is conducted by referencing the TRT at the reference given in the column “TRT Reference” in **Table 9.4 Transition Criterion Evaluation** below.

Table 9.4 Transition Criterion Evaluation (15 points)

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
4.1.	Transition Team Structure and Experience	<p>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.</p> <p>The key inquiry is: Does the Bidder's proposal for Transition as defined in the <u>Business Requirements Specification</u> include a formally defined multidisciplinary Transition team with named and experienced key resources?</p>	<p>4: The Bidder's proposal for a Transition team structure has been formally defined and includes experienced personnel that meet all the following minimum requirements:</p> <ul style="list-style-type: none"> • All team members have experience in transitioning two (2) projects similar in size of SARS. • Summary of individual experience clearly stipulating the roles in the project, minimum qualification/certification based on the areas below and roles of team members in previous/past transitions. • The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: <ul style="list-style-type: none"> ○ Transition Management; ○ Project Management/Programme Management; ○ Vendor and Contract Management; ○ IT Service Management; and ○ Technical Subject Matter Experts. <p>2: The Bidder's proposal for a Transition team structure has been formally defined and includes personnel that meet all the following minimum requirements:</p> <p>Each team member has experience in transitioning one (1) project similar in size as SARS.</p> <ul style="list-style-type: none"> • The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: <ul style="list-style-type: none"> ○ Transition Management; ○ Project Management/Programme Management; ○ Vendor and Contract Management; ○ IT Service Management; and 	<p>4 = 7.50</p> <p>2 = 3.75</p> <p>0 = 0</p>	4.1

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<ul style="list-style-type: none"> Technical Subject Matter Experts. <p>0: The Bidder's proposal for a Transition team structure does not meet SARS's minimum requirements.</p> <p>The Bidder may provide additional areas of expertise over and above the minimum requirements, in relation to the teams' experience, which they deem key to a successful transition process.</p>		
4.2.	Transition Plan	<p>SARS aims to assess the Bidder's proposal for transitioning the services effectively. All requirements for Transitioning in the <u>Business Requirements Specification</u>, the <u>Agreement</u> and the <u>RFP Main Document</u> must be included in the scope of the project, including the plan to meet the required timelines.</p> <p>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?</p>	<p>4: The Bidder's proposal for a transition plan contains the minimum requirements for a successful transition project outlined below:</p> <ul style="list-style-type: none"> Include a Gantt chart of activities, showing milestones, resourcing, and timing of each activity; Clearly stipulated stages of the transition project (e.g., Initiation, Planning, Execution, Monitoring, Closure); The project schedule with scope, timelines, dependencies, milestones, deliverables, based on the services provided in Tower E and showing a maximum transition period of three (3) months; Defined Roles and Responsibilities (between SARS, outgoing service provider, incoming service provider); Stakeholder Engagement and Communication; Risk Management; Deployment and migration approach; Training and Knowledge Transfer; Quality assurance; Post-Transition Support and Optimisation; and Transition approach - Specify how downtime and disruptions will be minimised during the transition. <p>0: The Bidder's proposal for a transition plan does not meet SARS's minimum requirements for a successful transition project.</p>	<p>4 = 7.50</p> <p>0 = 0.00</p>	4.2

9.5 Price and B-BBEE/specific goals evaluation (Gate 3) per Tower N, Tower S and Tower E

- 9.5.1 In line with the requirements of the Preferential Procurement Policy Framework Act, and its Regulations and SARS Preferential Procurement Policy, only Bidders that have met or exceeded the minimum threshold for functionality in the technical evaluation will be evaluated further.
- 9.5.2 SARS will apply the applicable preference point system in accordance with published the preference point system. Should actual pricing proposals submitted by the Bidders differ from the estimated costs prescribing the system to be used, the lowest acceptable tender will be used to determine the applicable preference point system.

Table 10: Price and B-BBEE/specific goals evaluation

	Criteria	Points
1.	Price	90
2.	Specific goals	10
	TOTAL	100

9.5.3 Price evaluation (Gate 3, Stage 1)

- 9.5.3.1 Points for the price evaluation will be calculated in accordance with the formula stated below.
- 9.5.3.2 Bidders are required to complete all line items in the pricing response template(s) provided by SARS, which will be used for the price evaluation. The price should include all the goods and services required in the scope of work. Bidders must ensure the completeness and accuracy of the pricing figures provided in the pricing response template. Failure to complete the pricing response template/bill of quantities may lead to a bidder scoring zero for the pricing evaluation or disqualification of the bidder.

Table 11: Pricing evaluation formula

Price evaluation formula	Points
$P_s = 90 \left(1 - \frac{P_t - P_{min}}{P_{min}} \right)$	90

Where:

- P_s = Points scored for price of proposal under consideration
- P_t = Rand value of proposal under consideration
- P_{min} = Rand value of lowest acceptable proposal

9.5.4 B-BBEE/specific goals evaluation (Gate 3, Stage 2)

- 9.5.4.1 Points for the B-BBEE/specific goals evaluation will be allocated in accordance with a bidder's size and ownership as per Table 1 (on page 4 of 5) of the SBD 6.1 Preference Points Claim form claimed. Points for specific goals can only be awarded to a bidder who submits B-BBEE Affidavit/Certificate as evidence for entity size. And Bidders are required to submit CIPC registration documents or letter from an attorney or registered accountant in their letterhead for the verification of ownership points claimed.
- 9.5.4.2 Bidders who do not claim preference points on the SBD 6.1 document will be scored zero for B-BBEE/specific goals.
- 9.5.4.3 Failure of a Bidder to submit a B-BBEE certificate from a verification agency accredited by the South African Accreditation System (SANAS), a CIPC B-BBEE Certificate for Exempted Micro Enterprise (EME), or a sworn affidavit confirming annual turnover and level of black ownership in the case of an Exempted Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) together with the proposal, will be considered in a manner that preference points for Specific goals are not claimed.
- 9.5.4.4 The B-BBEE certificate or affidavit should be submitted in the name of the bidding entity. If the proposal is submitted by an incorporated joint venture, the incorporated joint venture must submit their B-BBEE status level verification certificate or affidavit.
- 9.5.4.5 If the proposal is submitted by an unincorporated joint venture/consortium arrangement, the unincorporated joint venture/consortium must submit a consolidated B-BBEE certificate or affidavit as if they were a group structure, and that such consolidated B-BBEE certificate or affidavit is prepared for every separate proposal.
- 9.5.4.6 SARS reserves the right to request Bidders to submit proof of any information, to substantiate claims made about their Specific goals.

Table 12: Specific goals evaluation points allocation

Specific goals evaluation criteria	Entity with at least 51% black ownership, at least 30% Black Women Ownership and with Black Youth Ownership	Entity with at least 51% Black Ownership	Entity with at least 30% Black Women Ownership	Entity with Black Youth Ownership
Points Allocation	10	5	3	2

- 9.5.4.7 The table below indicates the specific B-BBEE/specific goals documents that must be submitted for this RFP.

Table 13: B-BBEE/specific goals documents checklist

	Classification	Turnover	Submission requirement
1.	Exempted Micro Enterprise (EME)	Below R10 million per annum	<ul style="list-style-type: none"> An affidavit or certificate from CIPC.
2.	Qualifying Small Enterprise (QSE)	Between R10 million and R50 million per annum	<ul style="list-style-type: none"> An affidavit only 51% black ownership and above; or A copy of B-BBEE rating certificate from a South African National Accreditation System (SANAS)-accredited rating agency.
3.	Large Enterprise	Above R50 million per annum	<ul style="list-style-type: none"> A copy of B-BBEE rating certificate from a SANAS-accredited rating agency.

9.5.5 Consolidation of price and B-BBEE/specific goals evaluation (Gate 4) per Tower N, Tower S and Tower E

9.5.5.1 The points scored by a Bidder for the price evaluation and the B-BBEE/specific goals evaluation will be added together to determine the overall points a bidder's proposal will score out of 100 points for the consolidated price and B-BBEE/specific goals evaluation and ranking of the Bidders.

9.6 Financial risk analysis

9.6.1 SARS may conduct a financial risk analysis on the Bidders and SARS has the right not to make an award to a Bidder(s) if its risk analysis indicates a high risk.

9.6.2 The Bidders are required to submit complete sets of annual financial statements, for the three (3) most recent financial periods in the name of the bidding entity. The annual financial statements must either be audited or independently reviewed in accordance with the public interest score (PIS) in compliance with the Companies Act, 2008 (Act 71 of 2008), and the Bidders are required to submit the PIS in compliance with the Companies Act. The annual financial statements must contain:

9.6.2.1 A statement of profit and loss and other comprehensive income;

9.6.2.2 A statement of financial position;

9.6.2.3 A statement of cash flows;

9.6.2.4 A statement of changes in equity/net assets; and

9.6.2.5 Accompanying notes.

9.6.3 If the Bidder cannot provide the preceding year's audited/independently reviewed financial statements as part of its bid submission, it should submit draft annual financial statements or its latest management accounts, together with the three (3) most recent years' audited/independently reviewed annual financial statements.

9.6.4 Bidders who have been trading for less than three (3) financial periods must provide:

9.6.4.1 A letter detailing the fact, signed by a duly authorised representative of the entity;

9.6.4.2 The annual financial statements that the entity can provide, considering the period that it

has been trading; and

9.6.4.3 Any other information or documentation that would provide more clarity on the financial history of a bidder.

9.6.5 SARS reserves the right to request further information regarding the annual financial statements of a Bidder later to demonstrate the potential Bidder's financial capability. These will include, but are not limited to:

9.6.5.1 Holding company's/parent company's accounts;

9.6.5.2 Management accounts;

9.6.5.3 A signed letter from a recognised financial institution confirming capital availability and bank statements; and/or

9.6.5.4 Credit rating reports (confirming capital availability or access to capital).

9.6.6 If a subsidiary is the bidding entity and it submits the holding company's financial statements for financial analysis purposes, the holding company must furnish a performance guarantee that is signed by a financial service provider (guarantor) of the holding company, stating that the guarantor will undertake to cover any or all risks associated with a bidder, if the bidder is awarded the RFP.

9.6.7 If the proposal is submitted by an incorporated joint venture, the incorporated joint venture is required to submit annual financial statements of the joint venture. If the proposal is submitted by an unincorporated joint venture/consortium arrangement, the unincorporated joint venture/consortium is required to submit annual financial statements of each of the parties to the arrangement.

9.6.8 SARS reserves the right to request a financial guarantee from the recommended bidder(s) prior to award, based on the financial risk evaluation outcome.

9.7 **Recommended Bidders' due diligence and risk assessment prior to award**

9.7.1 SARS has a legal and moral obligation to ensure that a supplier's financial position does not place public money or services at unacceptable risks and will, therefore, perform due diligence and risk assessment of recommended bidder(s) prior to award.

9.7.2 As part of due diligence and risk assessment, the Bidder must ensure that it is complying with all regulatory prescripts, including industry regulations specific to the commodity/services procuring, that are applicable to this tender, as well as ethical business practices. SARS has the right to request evidence of this compliance from the bidder, and third parties, for purposes of the due diligence exercise and for audit or contracting arrangements.

9.7.3 If a due diligence exercise reveals that a recommended Bidder does not comply with SARS's risk appetite or compliance requirements, then SARS has the right not to make an award to the recommended bidder.

9.7.4 The recommended Bidder(s) will be required to consent in the agreement to continuous and in-depth due diligence to ensure ethical business practices throughout the term of the tender.

9.8 **Proposed legal agreement**

9.8.1 Any award made to a Bidder under this RFP is conditional, among other provisions, upon SARS and such Bidder concluding a written agreement within 21 (twenty-one) working days of the Bidder receiving the written agreement. The timeous finalisation of such an agreement will be an absolute

pre-condition to the recommended Bidder(s) being awarded the tender and providing the goods or services to SARS.

9.8.2 If the recommended Bidder(s) fails to sign the proposed agreement within the timeframe stipulated, SARS reserves the right to:

9.8.2.1 Cancel the award to the recommended Bidder;

9.8.2.2 Negotiate with the second-ranked Bidder(s) and conclude the proposed agreement with such second-ranked Bidder(s); or

9.8.2.3 Take any other action that SARS deems reasonable and appropriate.

9.8.3 **Bidders are requested to:**

9.8.3.1 Comment on the terms and conditions set out in the draft agreement and, where necessary, propose required changes to such terms and conditions;

9.8.3.2 Ensure that each comment and/or amendment is explained; and

9.8.3.3 Ensure that all changes and/or amendments to the agreement are in an easily identifiable colour font and tracked for ease of reference.

9.8.3.4 SARS reserves the right to accept or reject any such mark-ups or comments.

9.8.4 **Mark-ups/Comments**

9.8.4.1 Bidders may mark-up/comment on the terms and conditions of this agreement, its schedules, appendices and attachments. SARS reserves the right to accept or reject any such mark-ups or comments. Each comment and/or amendment must be explained. All changes and/or amendments to the agreement must be in an easily identifiable colour font and tracked for ease of reference. SARS reserves the right to accept or reject any such mark-ups or comments.

9.8.4.2 Mark-ups/comments will NOT be acceptable regarding the following clauses:

9.8.4.2.1 Confidentiality;

9.8.4.2.2 Data Protection Agreement ;

9.8.4.2.3 Tax Compliance;

9.8.4.2.4 Audit Rights;

9.8.4.2.5 B-BBEE;

9.8.4.2.6 Vetting (integrity and security competence);

9.8.4.2.7 Limitation of liability;

9.8.4.2.8 Insurance;

9.8.4.2.9 Performance bond; and

9.8.4.2.10 Records retention.

9.8.4.2.11 Service Levels (Schedule C)

9.8.5 Upon award, SARS and the successful Bidder(s) will conclude the agreement that regulates the specific terms and conditions applicable to the goods and services being procured by SARS. In this regard:

9.8.5.1 SARS will negotiate with the Bidder(s) to conclude the agreement;

9.8.5.2 SARS will be entitled to cease negotiating with a Bidder if SARS, in its sole discretion, is of the opinion that the Bidder has made misrepresentations in its proposal, is attempting to withdraw from positions or commitments made in its proposal, is not negotiating in good faith, an agreement may not be expeditiously concluded with the bidder for any other reason;

9.8.5.3 SARS reserves the right to vary the terms and conditions of the proposed agreement during the negotiations with a bidder at SARS' sole discretion; and

9.8.5.4 SARS reserves the right to accept or reject any or all amendments or additions proposed by the successful bidder if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

9.8.6 A Bidder should note that the terms of its proposal will be incorporated in the proposed agreement by reference and that SARS relies upon the Bidder's proposal as a material representation in making an award to a successful bidder and in concluding an agreement with the bidder. As such, any misrepresentations in a proposal may result in legal action or other processes by SARS against the Bidder, notwithstanding the conclusion of an agreement between SARS and the Bidder for the provision of the goods and services in question. If a conflict arises between the Bidder's proposal and the agreement concluded between the parties, the agreement will prevail.

9.9 Performance Bond

9.9.1 The Service Provider will post on the Effective Date, a performance bond ("**Performance Bond**") by a financial institution approved by SARS and in the form prescribed by SARS, or if SARS does not prescribe a form, in a form proposed by the Service Provider and approved by SARS at its sole discretion. Notwithstanding the generality of the above, such Performance Bond will secure the Service Provider's obligations in an amount equal to:

Note to the Bidder:

	Tower	Performance bond value
1.	Tower N	The Performance Bond will be equal to the lesser of R5 000 000.00 (Five Million Rand) awarded to the Bidder or 50% of the total of the charges that will be made by the Service Provider for Services under this Agreement in the first 12 (twelve) months of the Term.
2.	Tower S	The Performance Bond will be equal to the lesser of R1 600 000.00 (One million, Six Hundred Thousand Rand) awarded to the Bidder or 50% of the total of the charges that will be made by the Service Provider for Services under this Agreement in the first 12 (twelve) months of the Term
3.	Tower E	The Performance Bond will be equal to the lesser of R700 000.00 (Seven Hundred Thousand Rand) awarded to the Bidder or 50% of the total of the charges that will be made by the Service Provider for Services under this Agreement in the first 12 (twelve) months of the Term.
Note:		<i>The Performance Bond will operate in aggregate, i.e., if the Bidder is awarded more than one Tower the Performance Bond as determined above per Tower must be summed to determine the amount required for the Performance Bond.</i>

- 9.9.2 SARS will be entitled to make a claim for payment from the Performance Bond if:
- 9.9.2.1 The Service Provider materially breaches this Agreement, and the breach is reasonably capable of being remedied and the Service Provider fails to remedy such breach within 30 (thirty) days of being called upon by SARS to do so;
 - 9.9.2.2 The breach cannot be remedied;
 - 9.9.2.3 An event occurs in respect of which this Agreement permits SARS to recover a penalty or similar service credit from the Service Provider and the Service Provider fails to pay such penalty when it is due in terms of this Agreement; and/or
 - 9.9.2.4 The Service Provider is placed under provisional or final liquidation; placed under judicial management; enters an arrangement with its creditors; or Service Provider enters into business rescue procedures under Chapter 6 of the Companies Act, 2008.
- 9.9.3 To avoid doubt, any claim that SARS may be entitled to make under the Performance Bond will be subject to (i) the indemnities and limitations of liability contained in clauses 21 and 22 of the *SARS RFP 03-2024 4-1 Network, Server and End-user Device Support Services Agreement* and (ii) the Performance Bond claims procedure contained in this clause 8.9. .
- 9.9.4 The Service Provider will not be absolved of any of its obligations and liabilities under this Agreement by virtue of it having furnished the Performance Bond.
- 9.9.5 If SARS intends to encash the Performance Bond, it must demand, on 15 (fifteen) days' written notice, payment from the Service Provider, specifying:
- 9.9.5.1 The cause of the claim; and
 - 9.9.5.2 The amount claimed.
- 9.9.6 If the Service Provider fails to make payment as per SARS's demand in clause 8.9.2 or fails to lodge a dispute in accordance with clause 27 of the *SARS RFP 03-2024 4-1 Network, Server and End-user Device Support Agreement* within 15 (fifteen) days of receipt of SARS's notice in accordance with clause 8.9.7, SARS will be entitled to encash the Performance Bond with immediate effect.
- 9.9.7 If SARS encashes the Performance Bond in terms of clause 8.9.2, SARS will be entitled to recover from the proceeds of the Performance Bond all of (i) SARS's Losses occasioned by the Service Provider; (ii) all amounts for which the Service Provider is liable in terms of any indemnities given by it to SARS; (iii) all penalties which SARS is entitled to impose upon the Service Provider; (iv) all legal costs which SARS is entitled to recover from the Service Provider in asserting SARS' rights under this Agreement and the Performance Bond; and (v) any other amounts which may be owing by the Service Provider to SARS, of whatever nature and however arising; provided always that the provisions of this clause 8.9.7 will never be construed as in any way limiting SARS' right of recovery to the full value of the Performance Bond.
- 9.9.8 If SARS:
- 9.9.8.1 Cancels the Agreement pursuant to any matter referred to in **clause 8.9.2**, after SARS has recovered all amounts which may be owing to SARS by the Service Provider in terms of **clause 8.9.7**, SARS will pay the balance, if any, to the Service Provider; or

9.9.8.2 Does not cancel the Agreement pursuant to any matter referred to in **clause 8.9.2** the Service Provider will deliver to SARS, within 10 (ten) business days of SARS's written instruction, a new Performance Bond for the same value as that of the original Performance Bond (and for which purpose **clause 8.9** will again apply, *mutatis mutandis*) against delivery of which SARS will pay to the Service Provider the balance, if any, of the amounts remaining from the previous Performance Bond following SARS' recovery of the amounts owing to it in terms of **clause 8.9.7**.

9.9.9 The Performance Bond will automatically be revoked on expiry of a period of six (6) months after Termination of the Agreement.

9.10 Performance standards

9.10.1 SARS may prescribe certain performance standards (service levels) that a successful bidder must comply with in the performance of the services.

9.10.2 Failure to adhere to the service levels will result in SARS levying a financial penalty for the service level failure.

9.10.3 Multiple service level failures with the SARS' prescribed service levels will constitute a material breach of the SLA.

9.10.4 Notwithstanding the implementation of the service levels and financial penalties, SARS reserves the right, and without derogation to any other remedies it may have in law, to terminate the SLA for breach (persistent non-compliance) by the successful bidder.

10 TRUSTS, JOINT VENTURES, SUB-CONTRACTING AND OTHER ARRANGEMENTS

10.1 Proof of existence of a trust, joint venture, consortium and sub-contracting arrangements

10.1.1 Where, for the purposes of this RFP, a Bidder submits its proposal as a trust, such Bidder must submit concrete proof of the existence of a trust. SARS will accept a registered trust deed as acceptable proof of the existence of a trust. The trust deed must include, among others:

10.1.1.1 Details of the trustees of the trust; and

10.1.1.2 Details of the beneficiaries of the trust. In instances where the beneficiary is a trust, the trust deed of that specific trust is required.

10.1.2 Where, for the purposes of this RFP, a Bidder submits its proposal as a joint venture or consortium (incorporated or unincorporated), the Bidder must submit the joint venture/consortium agreement, which sets forth the following details:

10.1.2.1 Identification of each party to the agreement in full;

10.1.2.2 The percentage ownership of the joint venture/consortium of each party to the agreement (if applicable);

10.1.2.3 The precise functions and responsibilities that each party will fulfil in terms of the agreement; this should include details of the delimitations of scope within the goods and services to be assigned to such a party(ies);

- 10.1.2.5 The anticipated percentage of the revenue that the party(ies) would receive (anticipated revenue that the party(ies) would receive as a percentage of the total revenue that the bidder would anticipate receiving over the term of the agreement with SARS), if the Bidder is successful; and
- 10.1.2.6 Clear roles and responsibilities of the lead partner and the remainder joint venture/consortium party(ies); the agreement must also clearly identify the lead partner, who shall be given the power of attorney to bind the other party(ies), in respect of matters pertaining to the joint venture.
- 10.1.2.7 If a Bidder is submitting a proposal in the form of an unincorporated joint venture/consortium, the SBD 4 Bidder's disclosure form should be completed by each party participating in the joint venture/consortium agreement, and proof of CSD registration should be submitted for all parties participating in the joint venture/consortium for this RFP.
- 10.1.2.8 Joint venture members should be advised that each member will be held jointly and severally liable for the performance of the joint venture.
- 10.1.3 Where, for the purposes of this RFP, a Bidder has or intends to subcontract areas of scope of the goods and services, the bidder must submit the subcontracting agreement, and must note the following:
 - 10.1.3.1 The Bidder must indicate the name of the subcontractor(s), the percentage of the contract that will be subcontracted, the B-BBEE status level of the subcontractor(s) and whether the subcontractor(s) is an EME or QSE;
 - 10.1.3.2 A bidder awarded a contract, may only enter into a subcontracting arrangement with the approval of SARS;
 - 10.1.3.3 The agreement will be concluded between the main contractor(s) and SARS; therefore, the main contractor(s) and not its/their subcontractor(s) will be held liable for performance in terms of its contractual obligations;
 - 10.1.3.4 The successful Bidder must always be solely and entirely accountable to SARS for the performance of its contractual obligations in terms of the agreement; and
 - 10.1.3.5 Without diminishing the Bidder's accountability in any way for the delivery of the services, including the performance standards, SARS may require access to and transparency in the sub-contracting agreements; the full details of the functions that the subcontractor will fulfil in terms of the agreement, including details of the delimitations of scope within the services to be assigned to such a subcontractor; monitoring and reporting of subcontractor's participation and performance to SARS; direct participation of subcontractor(s) in the account and project planning activities; and subcontractors' representation in governance structures and committees. SARS will always demand fair dealing in the relationship between a Bidder and its subcontractor(s).

11 COMPLAINTS AND ALLEGATIONS

- 11.1.1 Should a Bidder have rational reasons to believe that the tender process is unfair or irregular, including the fact that the technical specifications are not open and/or are written for a particular bidder, brand or product, the bidder is urged to notify the Procurement Department within 10 (ten) days after publication of the bid and provide details of its complaint for SARS's consideration.
- 11.1.2 Any suspicious activity, including requests, approaches or calls asking for upfront payment to secure an award of a bid or in lieu of claims that the outcome of a tender can be influenced towards a particular bidder, bidders are requested to immediately inform the *SARS Fraud/Anti-corruption* Hotline on 0800-002870 or via email at anti-corruption@sars.gov.za for further investigation.

- 11.1.4 The “SARS hotline” further provides an anonymous reporting channel for any unethical behaviour that a bidder wants to report.

12 GENERAL CONDITIONS OF BIDDING

- 12.1 **By bidding, a Bidder is deemed to have accepted all terms and conditions of this RFP; and is further deemed to have accepted that if successful, any award made will be made subject to the terms and conditions of this RFP.**

12.2 Reservation of rights

- 12.2.1 In addition to any rights that SARS has reserved to itself in this document or any other document in the RFP pack, SARS reserves the right, in its sole discretion, to:

- 12.2.1.1 Make no award or accept part of a proposal rather than the whole;
- 12.2.1.2 Withdraw or cancel this RFP;
- 12.2.1.3 Amend, vary or supplement any of the information, terms or requirements contained in this RFP, any information or requirements delivered pursuant to this RFP, or the structure of the RFP process;
- 12.2.1.4 Schedule additional briefing sessions/site inspections; conduct site visits and site inspections, product evaluations, local content evaluations, and/or perform audits including due diligence exercises on any bidder whenever SARS deems it prudent to do so;
- 12.2.1.5 No longer consider a Bidder’s proposal where adverse information about the Bidder or its proposal submission has come to the attention of SARS, provided that such Bidder is informed accordingly and afforded an opportunity to object;
- 12.2.1.6 Subject to applicable legislation and conditions of tender, award a proposal based on which bidder is offering the best value for money, even if such proposal has not scored the highest points during the evaluation;
- 12.2.1.7 Conduct a risk assessment of a Bidder’s capability to deliver the goods and perform the services in accordance with the specified service levels and/or achieve SARS’s objectives;
- 12.2.1.8 Request clarification or verification in respect of any information contained in or omitted from a bidder’s proposal, which SARS may do either in writing or at a meeting convened with the bidder for that purpose;
- 12.2.1.9 Conduct due diligence on any Bidder or its subcontractor, which may include interviewing customer references or performing other activities to verify information and capabilities submitted, claimed, or otherwise, (including visiting a bidder’s, subcontractors, or customer reference premises, sites and/or facilities to verify certain stated facts or assumptions); the bidder will be obliged to grant SARS with all such access, assistance and/or information as SARS may reasonably request; the bidder must respond within the timeframes set by SARS, failing which SARS reserves the right not to consider the bidder’s proposal any further; and/or
- 12.2.1.10 Request presentations from such shortlisted bidders; all costs relating to the preparation of such presentations will be borne by the Bidders.

- 12.2.2 SARS will disqualify any Bidder, report to National Treasury and take the necessary steps to restrict a bidder from doing business with the State, who:

- 12.2.2.1 Engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other Bidder in respect of the subject matter

of this RFP;

- 12.2.2.2 Seeks any assistance, other than assistance officially provided by a government entity, from any employee, advisor or other representative of a government entity to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a government entity;
- 12.2.2.3 Makes or offers any gift, gratuity, anything of value or other inducement, whether lawful or unlawful, to any of SARS's officers, directors, employees, advisors or other representatives;
- 12.2.2.4 Makes or offers any gift, gratuity, anything of any value or other inducement, to any government entity's officers, directors, employees, advisors or other representatives to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a government entity;
- 12.2.2.5 Accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a government entity;
- 12.2.2.6 Pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, which is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a government entity;
- 12.2.2.7 Has been found guilty in a court of law or administrative or regulatory authority having appropriate jurisdiction on charges of unethical or improper conduct, regardless of whether a prison term or penalty was imposed;
- 12.2.2.8 Is listed on National Treasury's Register for Tender Defaulters or National Treasury's Database of Restricted Suppliers; or
- 12.2.2.9 Whose tender contains a misrepresentation that is materially incorrect or misleading.

12.2.3 Bidders' own conditions

- 12.2.3.1 Bidders may not come up with their own terms and conditions and/or counter conditions, modify or vary any of the terms, conditions or requirements herein. SARS may disqualify any bidder who fails to comply with this clause.

12.3 Conflict of interest

- 12.3.1 If at any time a Bidder identifies an actual or potential conflict of interest, it must immediately notify SARS in writing. SARS reserves the right to exclude the proposal submitted by such bidder from further consideration unless the Bidder can resolve the conflict to SARS's satisfaction. If it comes to SARS's attention that there was indeed a conflict of interest or a potential conflict of interest, same will be grounds for the immediate disqualification of the Bidder.

12.4 Confidentiality

- 12.4.1 Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, information contained in a Bidder's proposal(s) may not be disclosed by any bidder, other than to a person officially involved with SARS's examination and evaluation of a proposal.
- 12.4.2 Throughout this RFP process and thereafter, Bidders must secure SARS's written approval prior to the release of any information that pertains to the potential work or activities to which this RFP relates; or the process that follows this RFP. Failure to adhere to this requirement may result in

disqualification from the RFP process and such legal action as SARS may deem suitable.

12.5 Fronting

- 12.5.1 SARS supports the spirit of B-BBEE and recognises that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background, SARS condemns any form of fronting.
- 12.5.2 In ensuring that Bidders conduct themselves in an honest manner, SARS will, as part of the bid evaluation processes, conduct or initiate the necessary enquiries/investigations to determine the accuracy of the representations made in the bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade, Industry and Competition be established during such enquiry/investigation, the onus will be on the Bidder/contractor to prove that fronting does not exist. Failure to do so within 14 (fourteen) days from the date of notification may invalidate the bid/contract and may also result in the restriction of the bidder/contractor to conduct business with the public sector for a period not exceeding 10 (ten) years, in addition to any other remedies that SARS may have against the bidder/contractor concerned.

12.6 Insurance

- 12.6.1 The successful Bidder will be required, on or before the effective date of the agreement and for the duration of the agreement, to have and maintain in force adequate insurance cover consistent with acceptable and prudent business practices and acceptable to SARS, which shall include, without limitation, professional indemnity and public liability insurance cover as appropriate.

12.7 Indemnity

- 12.7.1 If a Bidder breaches any condition of this RFP and, as a result of that breach, SARS incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the RFP process and/or enforcement or defence of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds SARS harmless from any and all such costs that SARS may incur and for any damages or losses that SARS may suffer.
- 12.7.2 A successful bidder shall indemnify, hold harmless and agree to defend SARS and its officers, employees, agents, successors-in-title, and assigns, from any and all losses arising from, or in connection with, any of the following:
 - 12.7.2.1 Third-party claims attributable to any breach of the provisions of the services agreement by the successful Bidder;
 - 12.7.2.2 Third-party claims attributable to theft, fraud or other unlawful activity or any negligent, wilful or fraudulent conduct by the successful bidder or its employees and claims attributable to errors and/or omissions;
 - 12.7.2.3 Third-party claims arising from or related to the death or bodily injury of any SARS agent, employee, business invitee, or business visitor or other person on SARS' premises caused by the negligent acts or omissions of the successful Bidder or its employees; and
 - 12.7.2.4 Third-party claims arising from damage to property owned or leased by SARS or a third party caused by the successful Bidder's or its employees' negligence or misconduct.

12.9 Intellectual property

- 12.9.1 SARS retains ownership of all intellectual property rights in the documents that form part of this RFP.
- 12.9.2 Bidders will retain the intellectual property rights in their proposals but grant SARS the right to reproduce any copyrighted works for the purposes of the tender process.
- 12.9.3 Subject to any specific provisions in any SLA, master services agreement, work orders or change orders or any other agreement concluded between SARS and a bidder in terms of this RFP, all intellectual property rights created, generated, coded or designed in terms of this bid to meet SARS's business requirements and needs will be, and remain the perpetual exclusive property of SARS. Successful Bidders who create, generate, code or design any intellectual property for SARS in terms of this RFP, undertake to provide SARS with full access to such intellectual property, including the provision of security keys and access codes both during and after the bidder's appointment as a service provider or vendor.
- 12.9.4 If any bidder utilises any third-party intellectual property, in terms of a licence, to submit a bid, or that such third-party intellectual property will be utilised to fulfil SARS's business requirements for the bid, Bidders firstly warrant that they have the rights to do so and, secondly, agree to fully indemnify SARS against in any claims whatsoever arising from the application of third-party intellectual property in the SARS environment and on the basis of SARS's indemnity rights in the indemnity clause above.

12.10 Limitation of liability

- 12.10.1 A Bidder participates in this RFP process entirely at its own risk and cost. SARS will not be liable to compensate a Bidder on any grounds whatsoever for any costs incurred or any damages suffered because of the bidder's participation in this RFP process.

12.11 Preparation costs

- 12.11.1 A Bidder will bear all its costs in preparing, submitting, delivering and presenting any response or proposal to this RFP and all other costs incurred by it throughout the RFP process. No statement in this RFP will be construed as placing SARS, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidders in the preparation of their response to this RFP.

12.12 Precedence

- 12.12.1 The terms and conditions of this document will prevail over any information provided during any briefing session or communication, whether oral or written, unless such information is official written communication, as set out per the Communication paragraph in this document, and that such information expressly states that it amends this document.

12.13 Responsibility for Bidder's personnel and subcontractors

- 12.13.1 A Bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives of a bidder), its sub-contractors (if any), and personnel of its subcontractors comply with all the terms and conditions of this RFP.
- 12.13.2 If SARS allows a Bidder to use subcontractors, such subcontractors will be the responsibility of the Bidder at all times and SARS will not, under any circumstances, be liable for any losses or damages incurred by such subcontractors.

12.13.3 However, the proposal shall be awarded to the Bidder as a primary contractor who shall be responsible for the management of the awarded proposal. No separate contract shall be entered into between SARS and/or its client and any such subcontractors.

12.13.4 If a Bidder includes evidence of experience of individuals that are not currently employed by the said bidder, then the Bidder is required include a letter or agreement from the respective individual whose evidence of experience is included in the proposal in their submission, that the individual is aware and is in agreement that their evidence of experience may be included for tendering purposes, and that the said individual confirms to commit and will make him/herself available for the contract period should the contract be awarded.

12.13.5 If a Bidder includes experience of an entity other than the Bidder itself, then the Bidder must include in their submission a letter or agreement from the respective entity that the entity is aware and agrees that their experience may be included for tendering purposes. Copies of the signed agreements between the relevant parties must be attached to the proposal responses.

12.14 Prohibition of participation in resultant tender

12.14.1 Any Bidder, whether participating in a trust, joint venture, consortium and/or sub-contracting arrangement, who participates in preparatory work on the basis of which another tender will flow, may not participate in the resultant tender because of the advantage of having been privy to the underlying preparatory work.

12.15 RFP not an offer

12.15.1 This RFP does not constitute an offer to do business with SARS, but merely serves as an invitation to Bidders to facilitate a requirements-based decision process. Nothing in this RFP or any other communication made between SARS (including its officers, directors, employees, advisers and representatives) is a representation that SARS will offer, award or enter into an agreement with the bidder.

12.16 SARS' Oath/Affirmation of secrecy

12.16.1 SARS has a policy in terms of which the successful Bidder, key personnel or any other personnel as may be determined by SARS will be required, upon award, to individually take a mandatory oath/declaration/affirmation of secrecy. Therefore, the award will be made subject to the condition that the successful bidder along with the personnel referred to above comply with the aforementioned policy.

12.17 Screening and vetting of a Bidder

12.17.1 Acceptance of a Bidder's proposal is subject to the condition that both the successful bidder and its personnel providing the goods and services must be screened and cleared by the appropriate authorities to the grade of clearance in line with SARS's applicable policies.

12.17.2 Obtaining the necessary clearance is the responsibility of the successful Bidder concerned. If the successful Bidder appoints a subcontractor. The same provisions and measures will apply to the subcontractor.

12.17.3 Bidders shall supply and maintain a list of personnel involved in the project indicating their clearance status.

12.18 Tax compliance

- 12.18.1 It is a requirement that any supplier conducting business with SARS is tax compliant at the date of award of a contract/bid and remains tax compliant throughout the duration of its contracts with SARS.
- 12.18.2 No contract/bid may be awarded to a supplier who is not tax compliant. SARS reserves the right to withdraw an award made, or cancel a contract concluded with a supplier/successful bidder if it is established that such supplier/bidder was in fact not tax compliant at the time of the award. SARS further reserves the right to cancel a contract with a supplier/successful bidder if such supplier/Bidder does not remain tax compliant for the full term of its contract.
- 12.18.3 Where the recommended supplier/Bidder is not tax compliant, it must be notified of its non-compliant status in writing and be granted a minimum of seven (7) working days to rectify its tax compliance status with SARS. Thereafter, the supplier/Bidder is responsible for providing SARS with proof of its tax compliance status, which must be verified through the CSD and/or Tax Compliance System.
- 12.18.4 In line with SARS's strategic objectives, the directors/owners of the bidding entity who are not tax compliant may be referred to the SARS Taxpayer Engagement Operations for further investigation to achieve full tax compliance.

12.19 Tender defaulters and restricted suppliers

- 12.19.1 No bid will be awarded to a Bidder whose name (or any of its members, directors, partners or trustees) appears on National Treasury's Register for Tender Defaulters or National Treasury's Database of Restricted Suppliers.

12.20 Local production and content

- 12.20.1 SARS supports and promotes local production and content, environmentally friendly products, and sustainable sourcing.
- 12.20.2 To enable this objective to be adequately assessed and as part of contract management, a Bidder shall advise SARS of its local and regional strategy and its initiatives to involve, support and use local/regional entities and workforce.
- 12.20.3 The appointed supplier shall provide and use, for the performance of this contract, local subcontractors or locally acquired materials, equipment and facilities, to the extent available and within reasonable costs, to produce the quality and quantity of work and materials required by this contract.

12.21 Validity of information

- 12.21.1 SARS has made reasonable efforts to ensure the accuracy of the information contained in this RFP. However, neither SARS, nor its employees, officers, advisers or agents will be liable (directly or otherwise) to a Bidder or any third party for any inaccuracy or omission of any information in the RFP or in respect of any additional information SARS may provide to a bidder as part of the RFP process.
- 12.21.2 A Bidder is deemed to have examined this RFP and any other information supplied by SARS to the Bidder and to have satisfied itself of the correctness and sufficiency of such information before submitting any of its responses.

12.23 **Governing law**

12.23.1 This RFP and any resultant agreement shall be governed by the laws of the Republic of South Africa.

13 **INSTRUCTIONS FOR SUBMITTING A RESPONSE TO THIS RFP**

13.1 This paragraph details the instructions to Bidders for preparing a proposal in response to RFP 03-2024. These instructions must be followed in detail to enable the information contained in the bidder's proposal to be read, understood and evaluated in a common and consistent layout. If a proposal that is not in the correct format is received, SARS reserves the right to reject the entire proposal or portions of it, depending on the extent of the deviation from the format described in this document. Information that has not been requested must not be submitted in the Bidder's proposal.

13.2 **Proposal format**

13.2.1 The contents of the Bidder's proposal as detailed in this section.

13.2.2 The Bidders must submit a single hardcopy of its proposal contained in several hardcopy files and a single electronic copy (USB).

13.2.3 The Bidder's hardcopy must be printed on one side.

13.2.4 Where reference is made to a "hardcopy file", this means a separate A4 ring-bound file. Where reference is made to an "electronic copy", this means a separate USB. The proposal submission will consist of several hardcopy files and USBs.

13.2.5 A file will consist of a hardcopy file and an electronic copy of the hardcopy file.

13.2.6 A file (the hardcopy file and USB) must be wrapped and sealed in brown paper and labelled with the same text as the hardcopy file and USB.

13.3 **Organisation and contents of a proposal**

13.3.2 Common File

Irrespective of which or how many Towers the Bidder is submitting a proposal for, it will be required to submit the Common File. This file must contain the sections listed below, each divided by a file divider in the hardcopy file and placed in separate directories on the electronic copy USB.

Common File		
Label (on both file cover and memory stick (USB stick))		RFP 03/2024 <Bidder Name> Common File
No.	File divider/Directory name	Content required
1	Covering Letter	<p>A letter from the Bidder confirming the submission of the proposal, for which Tower(s) the Bidder is submitting its proposal and is signed by an authorised signatory of the bidder.</p> <p>No template is provided – this is to be submitted in free format and must be submitted on the Bidder's letterhead.</p> <p>PDF format in electronic copy.</p>
2	Board Resolution	<p>A signed Board resolution authorising the Bidder's signatory.</p> <p>In the electronic copy, the original signed document must be scanned and submitted in PDF format.</p>
3	SBDs	<p>Completed SBDs.</p> <p><u>Invitation to Bid (SBD1)</u></p> <p><u>Declaration of Interest (SBD 4)</u></p> <p><u>National Industrial Participation Program (SBD 5)</u></p> <p><u>Supplier Cost and Risk Assessment Questionnaire</u></p> <p>The original signed documents must be included in the hardcopy file.</p> <p>In the electronic copy, the original signed document must be scanned and submitted in PDF format.</p>
4	Bidder CSD Registration Report	<p>CSD registration report, including the tax clearance status.</p> <p>In the hardcopy file, a printout of the report obtained from the CSD system should be included (www.csd.gov.za).</p> <p>In the electronic copy, the downloaded PDF report should be included.</p>

5	Supplier Cost and Risk Assessment Questionnaire	Supplier Cost and Risk Assessment Questionnaire. The original signed documents must be included in the hardcopy file. In the electronic copy, the original signed document must be scanned and submitted in PDF format.
6	Complete sets of three (3) most recent Annual Financial Statements	Complete sets of Bidder's three (3) most recent Annual Financial Statements. In the electronic copy, the originals must be scanned and submitted in PDF format.
7.	Contract Agreement	The Bidder must submit a signed agreement.
8	Checklist	Completed template: <u><i>Proposal Checklist</i></u> A signed printout of the completed template must be included in the hardcopy file. A scanned copy of the signed checklist must be submitted in PDF format.

13.3.3 File NP-x (Non-pricing Section for Tower x)

Depending on which and for how many Towers the Bidder is submitting a proposal, the Bidder will be required to submit a File NP-x for each Tower bid upon (where x is the Tower reference). This file must contain the sections listed below, each divided by a file divider in the hardcopy file and placed in separate directories on the electronic copy USB and labelled as set out hereunder. Note that the x is the Tower reference appearing in the title, divider name, directory names and filenames.

Note that if a Bidder is submitting a proposal for more than one Tower, the same documents may have to be submitted in more than one File. (For example, if a subcontractor is proposed in more than one Tower, then the subcontractor's CSD Registration Report should be submitted in each Tower file for which the subcontractor is being proposed). Note that an original certificate need not be supplied in every file, provided that where a copy is provided, the copy contains a note referencing the file in which the original is contained. This principle applies to all documents, so that all documents for a Tower are contained within the file for a Tower and can be evaluated as a self-contained pack.

File NP-x (Non-Pricing Section for Tower x)		
Label (on both file cover and memory stick (USB stick))		RFP 03/2024 <Bidder Name> File-NP-x Non-pricing
No.	File divider/Directory name	Content required
1	Mandatory response template	Completed template: <u><i>Tower x Mandatory Response Template</i></u> (where x is the Tower reference for which the Bidder is submitting a response) A printout of the completed and signed template(s) must be included in the hardcopy file. The completed template(s) must be submitted in Microsoft Word format in the electronic copy.
2	Technical Response Template	Completed template: <u><i>Tower x Technical Response Template</i></u> A printout of the completed, signed and initialled template must be included in the hardcopy file. The completed template must be submitted in Microsoft Word format in the electronic copy.
3.	Subcontractor CSD Registration Report.	In the hardcopy file a printout of the report obtained from the CSD system should be included. (www.csd.gov.za). In the electronic copy the downloaded PDF report should be included.

13.3.4 File P-x (Pricing and B-BBEE/Specific Goals Section for Tower x)

- 13.3.4.1 Depending on which and how many Towers the Bidder is submitting a proposal for, the Bidder will be required to submit a File P-x for each Tower for which it is submitting a proposal (where x is the Tower reference). This file contains one section to be placed in a file divider in the hardcopy file and in a directory on the electronic copy USB with the label set out hereunder. Note that the “x” (appearing in the title, directories and filenames) is the Tower reference. The actual Tower reference must be substituted for “x” in the Bidder’s response.
- 13.3.4.2 Note that if a Bidder is submitting a proposal for more than one Tower, the same documents may have to be submitted in more than one file. (For example, if a subcontractor is proposed in more than one Tower, then the subcontractor’s B-BBEE certificate must be submitted in each Tower file for which the subcontractor is being proposed.) Note that an original certificate need not be supplied in every file, provided that where a copy is provided, the copy must contain a note referencing the file in which the original is contained. This principle applies to all documents, so that all documents for a Tower are contained within the file for a Tower and can be evaluated as a self-contained pack.

File P-x (Pricing Section for Tower x)		
Label (on both file cover and memory stick (USB stick))		RFP 03/2024 <Bidder Name> File-P-x Pricing
No.	File divider/Directory name	Content required
1	Pricing Response Template	Completed template: <u><i>Tower x Pricing Response Template</i></u> A printout of the completed template must be included in the hardcopy file. The completed template must be submitted in Microsoft Excel format in the electronic copy.
2	Preference Points Claim Form	A completed Preference Points Claim Form (SBD 6.1) for Tower x.
3	Bidder's BEE Certificate	The Bidder's B-BBEE certificate, valid as at the closing date. For the electronic copy, the original hardcopy must be scanned and submitted in PDF format.
4	Subcontractor B-BBEE Certificates	For every subcontractor named by the Bidder in template 1 in 13.3.3 above, the Bidder must attach a B-BBEE certificate or auditor's report in the hardcopy file. The B-BBEE certificates must be scanned and submitted as PDF documents on the USB.

13.4 Example of a proposal

13.4.1 If a Bidder is submitting a proposal for Tower N and Tower S, it would consist of the following:

Files	Documents in the file
<p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 03/2024 <Bidder Name> Common File</p> <p>Electronic response to be submitted on a USB labelled:</p> <p>RFP 03-2024-<Bidder Name>-Common</p>	<ul style="list-style-type: none"> • Covering letter • Board resolution • SBDs • Bidder's CSD Registration Report • Annual Financial Statements • Contract agreement • Proposal Checklist (indicating that all documents have been submitted)
<p>Non-pricing Section – Tower N</p> <p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 03/2024 <Bidder Name> File NP-N Non-pricing</p> <p>Electronic response to be submitted on a USB labelled:</p> <p>RFP03-2024-<Bidder Name>-NP-N</p>	<ul style="list-style-type: none"> • Mandatory response template for Tower N • Technical response template for Tower N • Subcontractor list • Subcontractor's CSD Registration Report
<p>Pricing Section – Tower N</p> <p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 03/2024 <Bidder Name> File P-N Pricing</p> <p>Electronic response to be submitted on a USB labelled:</p> <p>RFP03-2024-<Bidder Name>-P-N</p>	<ul style="list-style-type: none"> • Pricing Response Template for Tower N • Preference Points Claim Form SBD 6.1 for Tower N • Bidder's B-BBEE/specific goals requirements • Subcontractors' B-BBEE certificates
<p>Non-pricing Section – Tower S</p> <p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 03/2024 <Bidder Name> File NP-S Non-pricing</p> <p>Electronic response to be submitted on a USB labelled:</p> <p>RFP03-2024-<Bidder Name>-NP-S</p>	<ul style="list-style-type: none"> • Mandatory response template for Tower S • Technical Response Template for Tower S • Subcontractor list • Subcontractor's CSD Registration Report •

Files	Documents in the file
Pricing Section – Tower S Hardcopy response to be submitted in file labelled: <p style="text-align: center;">RFP 03/2024 <Bidder Name> File P-S Pricing</p> Electronic response to be submitted on a USB labelled: RFP03-2024-<Bidder Name>-P-S	<ul style="list-style-type: none"> • Pricing Response Template for Tower S. • Preference Points Claim Form SBD 6.1 for Tower S • Bidder's B-BBEE//specific goals requirements • Subcontractors' B-BBEE certificates

13.4.2 The Bidder, in this example, will submit **five (5) sealed packages** wrapped in brown paper:

- (i) A package containing the hardcopy file of the Common File and the USB of the Common File labelled:

RFP 03/2024
<Bidder Name>
Common File

- (ii) A package containing the hardcopy file of File NP-N and the USB of File NP-N labelled:

RFP 03/2024
<Bidder Name>
File NP-N
Non-pricing

- (iii) A package containing the hardcopy file of File P-N and the USB of File P-N labelled:

RFP 03/2024
<Bidder Name>
File P-N
Pricing

- (iv) A package containing the hardcopy file of File NP-S and the USB of File NP-S labelled:

RFP 03/2024
<Bidder Name>
File NP-S
Non-pricing

- (v) A package containing the hardcopy file of File P-S and the USB of File P-S labelled:

RFP 03/2024
<Bidder Name>
File P-S
Pricing

13.5 Template-specific Instructions

13.5.1 Mandatory Template

The Bidder must complete and submit the Tower x Mandatory Response Template (where x is the Tower reference) for each Tower for which the Bidder is submitting a proposal.

The completed template(s) must be included in the non-pricing section for the Tower.

13.5.2 Technical Response Template

The Bidder must complete and submit Tower x Technical Response Template for each Tower for which it is submitting a proposal (where x is the Tower reference).

The Bidder must provide responses to all questions, requests for information or detail, or other requests posed to the Bidder in the technical response template document(s). Where a response is requested in the template and no response is supplied by the bidder, it will result in a zero being scored by the Bidder for that section.

The completed template must be included in the non-pricing section for the Tower.

13.5.3 Pricing Response Template

For each Tower for which the Bidder is submitting a proposal, the Bidder must provide a response to the Tower x Pricing Response Template (where x is the Tower reference).

The detailed instructions for preparing a response to the Tower x Pricing Response Template (where x is the Tower reference) are embedded in the template.

Bidders must submit an electronic copy, as well as a signed and initialled hardcopy of the Pricing Response Template. A submission that is not accompanied by an electronic copy will not be considered. The completed pricing template must contain values in all cells that are required to be populated. If the price is 0 (zero) for an item, the Bidder must ensure a zero is entered.

The completed template must be included in the pricing section for the Tower.

13.5.4 Proposal Checklist

The Bidder must complete, and a duly authorised representative must sign, the checklist Proposal Checklist. Only one checklist must be submitted, regardless of the number of Towers for which the Bidder is submitting a proposal.

The completed template must be included in the Common File.