

RFP07/2026 The Procurement of a Master Data Management and Data Governance Solution

Questions & Answers

Communication 2/2

#	Questions	Answers
30.	<p>MDM Architecture and Single Source of Truth</p> <p>In the BRS, section 3.1, it is made clear that master data must remain in place in operational systems and be maintained there, as opposed to needing to move it into a new storage area. However, in section 3.4 it states that unified access must be provided via a "single source of truth". This appears to contradict section 3.1. Please clarify.</p>	<ul style="list-style-type: none"> ▪ SARS's primary expectation is a virtualised / federated (Registry-style) MDM pattern rather than a centralised hub that physically materialises master entities into a new database. Authoritative source systems remain the system of record for the underlying attributes; the MDM solution provides the unified view, cross-system identity resolution (golden record), governance, lineage and quality controls over those source records. ▪ Where the solution requires technical objects to operate, for example metadata tables, match-and-merge indexes, cross-reference / survivorship structures, golden record indices, audit and lineage stores, those are accepted and expected as part of the platform's internal architecture. They are not regarded as data migration provided the source systems remain authoritative. ▪ Coexistence patterns (limited two-way synchronisation back to source systems for select attributes under workflow approval) are acceptable where business value is demonstrated, but a fully centralised hub model that requires SARS to re-platform master data into the MDM tool's database is not the preferred deployment.
31.	<p>MDM Architecture and Single Source of Truth</p> <p>In the BRS, section 3.1, the approach required seems to suggest a logical, or virtual, MDM architecture, rather than a</p>	<p>Yes, the existing master data records in the various operational systems are already consistent and linked via keys across.</p>

#	Questions	Answers
	<p>physical MDM hub type architecture. This logical approach therefore suggests that existing master data records in the various operational systems are already consistent and linked via keys across those systems. Is this correct?</p>	
<p>32.</p>	<p>MDM Architecture and Single Source of Truth</p> <p>Are there requirements to identify and maintain relationships between master data records, and/or hierarchies, for example those pertaining to parties?</p>	<p>Refer to the BRS section 3.1 (a)</p>
<p>33.</p>	<p>MDM Architecture and Single Source of Truth</p> <p>Section 3.1(b) of the BRS requires data virtualisation capability that integrates enterprise data across siloed systems and delivers it to business users in real time without physically storing the data. Does SARS have an existing data virtualisation layer or enterprise integration bus in place, and if so, what is the technology? Will the MDM and Data Governance platform be expected to replace, augment, or integrate with any existing virtualisation or integration infrastructure?</p>	<p>SARS does have an integration pattern. The solution must be able to integrate to all listed sources / technologies in the BRS, section 3.13.</p>
<p>34.</p>	<p>Data Domains and Scope</p> <p>The BRS references master data management across the enterprise but does not specify which master data domains are in scope for this engagement. Which domains does SARS intend to bring under governance during the three-year contract</p>	<p>The solution should be able to meet the requirements as stated in the BRS. The details of implementation will be shared at the contracting phase.</p>

#	Questions	Answers
	<p>period (for example: party/taxpayer, legal entity, employer, product, reference data, geography), and in what priority order? Please also provide estimated volumes of “golden records” per domain.</p>	
<p>35.</p>	<p>Data Domains and Scope</p> <p>The BRS references party data in the context of SARS's operational environment. Does the scope of this engagement include the management of party hierarchies and corporate group structures, including the relationship between natural persons and legal entities?</p>	<p>The SARS's master data entities include both natural and legal entities and the relationship between both entities.</p>
<p>36.</p>	<p>ADABAS, Mainframe, and Source Systems</p> <p>The RFP requires native or direct integration with Mainframe ADABAS, including access to data structures and metadata. Can SARS confirm the version of ADABAS in use, the mainframe operating environment (for example z/OS), and whether direct read/write access to ADABAS will be available to the integration team, or whether access will be mediated through a middleware or API layer?</p>	<p>Due to security reasons, the detail information regarding the mainframe operating environment will be shared at contracting phase.</p> <p>Connection to the mainframe ADABAS must connect natively and not through middleware.</p>
<p>37.</p>	<p>ADABAS, Mainframe, and Source Systems</p> <p>The BRS references DB2 as a required integration target (section 3.13). Can SARS confirm the DB2 environments in scope, including whether this refers to DB2 on mainframe, DB2 on distributed platforms, or both, and whether the EDW and Service Manager are the only DB2 environments to be</p>	<p>DB2 is a significant data layer together with SQL server and it is available to other use cases in the organisation. Other data stores engines are available and accessible through ODBC.</p>

#	Questions	Answers
	integrated?	
38.	<p>ADABAS, Mainframe, and Source Systems</p> <p>The BRS lists Microsoft Fabric as a required integration target. Can SARS confirm whether Microsoft Fabric is currently live in production, or whether it is a planned future-state environment? If it is planned, what is the expected deployment timeline relative to the MDM implementation?</p>	Please refer to the BRS section 3.13 (g).
39.	<p>ADABAS, Mainframe, and Source Systems</p> <p>Can SARS confirm the current version of SAP in use (for example S/4HANA or ECC), the SAP modules relevant to master data (for example MDG, BP, Material Master) and whether integration is required with SAP's native master data layer or at the database level?</p>	Please refer to the BRS section 3.13 (g).
40.	<p>ADABAS, Mainframe, and Source Systems</p> <p>The BRS (section 3.13) lists the SARS Customs Management System (CMS) as a required integration target. No technical specification, data model, or interface documentation for CMS has been provided in the RFP pack. Can SARS provide a technical integration specification for CMS?</p>	Due to the sensitivity and the nature of the technical specification, information will be provided at the contracting phase.
41.	<p>ADABAS, Mainframe, and Source Systems</p> <p>Does SARS currently have an existing data catalogue, metadata</p>	Currently SARS has not a fully integrated automated metadata solution as specified in the BRS. It is expected that the supplier must provide a transition strategy/approach at the contracting phase.

#	Questions	Answers
	<p>repository, or data lineage tool in place, even partially? If so, will the new platform be expected to ingest, migrate, or replace existing metadata assets, and what is the expected approach to the transition?</p>	
<p>42.</p>	<p>Single Platform Requirement</p> <p>Mandatory Requirement 3 states that the solution must be a single platform on a common codebase, not separate systems connected by APIs. The BRS simultaneously requires integration with numerous external systems (SAP, ADABAS, SQL Server, etc.) via standard integration mechanisms. Can SARS clarify whether the single platform requirement applies to the governance, MDM, metadata, and data quality modules of the proposed solution (i.e., these must be on one codebase), while external system connectivity via standard connectors and APIs is acceptable and expected?</p>	<p>The solution should be a single platform solution (without using multiple platforms) which cater for all aspects of Data Governance, Metadata and Data Quality.</p>
<p>43.</p>	<p>Data Sovereignty and Hosting</p> <p>The BRS (section 3.13(e)) requires that all data generated by the tool be computed and stored in a South African data centre compliant with SARS's data governance and information protection policies. Does SARS have a nominated or preferred South African data centre provider for this engagement, or is the selected bidder expected to propose and contract with a South African data centre provider independently?</p>	<ul style="list-style-type: none"> ▪ SARS will not prescribe a specific public cloud provider in this RFP. Vendors are expected to propose the cloud environment that best supports their platform, subject to the non-negotiable constraints below. Currently, SARS utilizes MS Azure as its primary public cloud provider. ▪ The cloud component must be deployed in a South African region to satisfy data residency, POPIA, TAA and broader SA sovereignty requirements stated in BRS Section 3.13. Off-shore SaaS tenancies that route or store SARS data outside South Africa will not be acceptable. ▪ SARS's strategic data and analytics platform (Microsoft Fabric, MSSQL, M365) is anchored on the Microsoft stack, and bidders should factor native interoperability with this estate into their solution architecture and TCO (Total Cost of

#	Questions	Answers
		<p>Ownership).</p> <ul style="list-style-type: none"> ▪ Cloud components must be hosted in a SARS-controlled tenancy (or a dedicated single-tenant arrangement equivalent to SARS-managed) to preserve key management, identity federation, audit and exit-rights. Multi-tenant vendor-controlled SaaS where SARS does not hold the tenancy will require explicit motivation and additional security/compliance demonstration. <p>The supplier must clearly identify in their proposal: (i) the cloud provider and SA region, (ii) tenancy model (SARS tenant vs vendor tenant vs dedicated single-tenant), (iii) data residency and sovereignty controls, and (iv) all data flows that cross the SARS perimeter.</p>
44.	<p>Subcontracting and Delivery Model</p> <p>Will SARS allow for remote work for this engagement?</p>	<p>Details of the implementation will be shared at a contracting phase.</p>
45.	<p>Data Quality</p> <p>The BRS (section 3.7(f)) states that the solution must examine the data quality issues list and determine which are the highest priorities based on how they are impacting revenue. Can SARS elaborate on this requirement?</p>	<p>The impact will be determined by the data quality metrics as per the BRS section 3.7 (a).</p>
46.	<p>Governance and Operating Model</p> <p>Has SARS established a formal Data Governance operating model, including named data owners and data stewards for any master data domains, prior to this procurement? Or is the establishment of the governance operating model expected to be a deliverable of this engagement?</p>	<p>SARS has an approved data governance framework, and it is expected that the supplier will adhere to it.</p>
47.	<p>Governance and Operating Model</p>	<p>The impact will be determined by the data quality metrics as per the BRS section 3.7 (a).</p>

#	Questions	Answers
	<p>The BRS (section 3.7(f)) and the broader governance requirements imply that SARS expects the platform to support revenue-linked data quality prioritisation. Can SARS confirm whether business rules linking data quality to revenue outcomes already exist within the organisation, or whether their definition forms part of the implementation scope?</p>	
48.	<p>Contract, SLAs, and Commercial Terms</p> <p>The BRS (section 4.2) specifies that the solution must be available 99.95% to 99.99% of the time, with unplanned downtime resolved within two hours. Will SARS prescribe specific financial penalty calculations for SLA failures at contract stage, and can SARS indicate the anticipated penalty structure so that it can be factored into the pricing and risk modelling?</p>	<p>Yes, the penalty structure will be detailed at the contracting phase.</p>

Communication 1/2

#	Questions	Answers
1.	<p>When SARS specifies a 'hybrid deployment model with both cloud-based and on-premises components,' does SARS already have a preferred cloud provider (e.g., Microsoft Azure, AWS, Google Cloud), or is the vendor expected to propose the cloud environment? Additionally, will the cloud components be hosted in a SARS-managed cloud tenant, or in the vendor's cloud infrastructure?</p>	<ul style="list-style-type: none"> ▪ SARS will not prescribe a specific public cloud provider in this RFP. Vendors are expected to propose the cloud environment that best supports their platform, subject to the non-negotiable constraints below. Currently, SARS utilizes MS Azure as its primary public cloud provider. ▪ The cloud component must be deployed in a South African region to satisfy data residency, POPIA, TAA and broader SA sovereignty requirements stated in BRS Section 3.13. Off-shore SaaS tenancies that route or store SARS data outside South Africa will not be acceptable. ▪ SARS's strategic data and analytics platform (Microsoft Fabric, MSSQL, M365) is anchored on the Microsoft stack, and bidders should factor native interoperability with this estate into their solution architecture and TCO (Total Cost of Ownership). ▪ Cloud components must be hosted in a SARS-controlled tenancy (or a dedicated single-tenant arrangement equivalent to SARS-managed) to preserve key management, identity federation, audit and exit-rights. Multi-tenant vendor-controlled SaaS where SARS does not hold the tenancy will require explicit motivation and additional security/compliance demonstration. <p>The supplier must clearly identify in their proposal: (i) the cloud provider and SA region, (ii) tenancy model (SARS tenant vs vendor tenant vs dedicated single-tenant), (iii) data residency and sovereignty controls, and (iv) all data flows that cross the SARS perimeter.</p>
2.	<p>SARS Customs Management System (CMS) integration - what is the backing DB for this? (BRS 3.13(g))</p>	<ul style="list-style-type: none"> ▪ The SARS Customs estate is anchored on the Customs Core Systems, which runs on IBM Power Series infrastructure with IBM DB2 as the backing relational database. This is consistent with BRS Section 3.13, which already lists DB2 explicitly as an in-scope integration target. ▪ Bidders must therefore design CMS integration on the basis of a DB2-on-IBM-

#	Questions	Answers
		<p>Power backing database. Acceptable integration patterns include DB2-native connectors and JDBC/ODBC-based metadata harvesting for cataloguing, lineage and quality profiling, together with change-data-capture or controlled replication into the SARS EDW layer where bulk data movement is required.</p> <ul style="list-style-type: none"> ▪ Direct production database access is not permitted. Connectivity must use SARS-approved integration channels and must respect platform-specific access patterns appropriate to the IBM Power / DB2 environment (including connection limits, workload isolation and audit logging). <p>Final connector specifications, schema visibility and access rules will be confirmed during the architecture and design phase by the SARS Customs domain team, the EDW team and Enterprise Architecture, in line with the governance model.</p>
3.	<p>The Master entities (e.g. Taxpayer) are described as created in source systems.</p> <ol style="list-style-type: none"> i. Does this mean that there is an expectation that schema/table or some other materialised object is created by the software solution as a part of the MDM flow across the various SARS systems? ii. Alternatively, is this meant to be a virtual concept (calculated)? (BRS 3.1(a)) 	<ul style="list-style-type: none"> ▪ No, SARS's primary expectation is a virtualised / federated (Registry-style) MDM pattern rather than a centralised hub that physically materialises master entities into a new database. Authoritative source systems remain the system of record for the underlying attributes; the MDM solution provides the unified view, cross-system identity resolution (golden record), governance, lineage and quality controls over those source records. ▪ Where the solution requires technical objects to operate, for example metadata tables, match-and-merge indexes, cross-reference / survivorship structures, golden record indices, audit and lineage stores, those are accepted and expected as part of the platform's internal architecture. They are not regarded as data migration provided the source systems remain authoritative. ▪ Coexistence patterns (limited two-way synchronisation back to source systems for select attributes under workflow approval) are acceptable where business value is demonstrated, but a fully centralised hub model that requires SARS to re-platform master data into the MDM tool's database is not the preferred

#	Questions	Answers
		<p>deployment.</p> <p>Bidders must clearly indicate which MDM style their solution supports natively (Registry, Consolidation, Coexistence, Centralised) and how they will deliver the SARS preference for Registry / Virtualisation with optional Coexistence for selected domains.</p>
4.	<p>Are we expected to propose a separate data privacy and data security tool to meet the requirements?</p>	<ul style="list-style-type: none"> ▪ No. SARS does not require, and does not expect, bidders to propose a separate, standalone data privacy or data security product. The capabilities described in BRS Section 3.8 (data masking, encryption, RBAC/ABAC, classification, audit logging, POPIA-aligned controls) must be delivered as native, integrated capabilities of the proposed MDM and Data Governance platform. ▪ The proposed solution must integrate with the existing SARS enterprise security and identity ecosystem, including SARS's identity provider for SSO/federated authentication, SARS's certificate and key management, and SARS's SIEM/log aggregation rather than introducing parallel tooling. ▪ Where a vendor's privacy and security capabilities are delivered as separately licensed modules of the same product family, this remains acceptable provided the modules are part of a single integrated platform, are quoted in the bid, and do not introduce a separate vendor. <p>Proposing a third-party or separate-vendor data privacy / DLP / data security tool to fill gaps in the primary MDM-DG platform is not aligned with the single-platform, single-vendor stance set out in BRS Section 3.13.</p>
5.	<p>Is SARS looking for a single vendor solution? Is a solution that integrates solutions from different vendors to address all SARS requirements acceptable?</p>	<ul style="list-style-type: none"> ▪ Yes. SARS is procuring a single-vendor, single-platform solution. The successful bidder must directly deliver all in-scope MDM, Data Governance, Metadata Management, Data Catalogue, Data Quality, Data Lineage, and Privacy / Security capabilities described in the BRS. ▪ Multi-vendor integrated stacks (for example, a separate data catalogue product from one vendor combined with an MDM hub from another, integrated through a

#	Questions	Answers
		<p>third) are not aligned with the single-platform requirement of BRS Section 3.13 and will not be accepted.</p> <ul style="list-style-type: none"> ▪ Subcontracting of implementation services is also not permitted. The bidder must demonstrate the in-house capability and certified resources to deliver the implementation, training and post-implementation support directly. <p>Where a vendor's platform is delivered as a suite of modules under a single product family, single licence agreement, single support contract and single roadmap, this is acceptable as a single-platform solution and not regarded as a multi-vendor stack.</p>
6.	<p>SARS requires at least two client references from South African MDM/Data Governance projects completed in the last 5 years. If local references are limited, can references from global parent company projects or international engagements be provided instead?</p>	<p>No, SARS will only accept South African proven references</p>
7.	<p>Automated Metadata Discovery: What percentage of metadata is currently documented vs. undocumented in SARS? Which systems have the most 'dark data' (undiscovered metadata)? Do you have existing metadata management tools we should integrate with?</p>	<p>Refer to the BRS section 3.2 and 3.3</p> <p>SARS does not have an existing automated and integrated metadata management tool.</p>
8.	<p>Impact Analysis Capability: When SARS changes a data field (e.g., 'TaxID format changes from 10 to 12 digits'), what needs to happen? (a) Just show which systems will be affected, (b) Show all downstream reports/dashboards, or (c) Actually simulate the change & show expected outcomes? What level of impact visibility is required?</p>	<p>SARS prefers the capability of the impact analysis using a dependency graph from a critical data element/ business application process. (on all a, b and c)</p>

#	Questions	Answers
9.	<p>What's the expected data volume growth over 3 years?</p> <p>i. What is the estimated total volume of master and related data records across key domains, and what is the expected growth over the next 3–5 years?</p> <p>ii. What are the approximate total data volumes (in TB/PB) across systems to be integrated, including both structured and unstructured data sources?</p>	<p>Refer to the BRS section 3.5 (a). The solution must be able to scale with SARS's data needs, accommodating growing volumes of data and metadata without compromising performance.</p>
10.	<p>Workflow Approval Levels & Versioning: How many approval levels does SARS need? (e.g., data steward → team lead → governance officer → sign-off?) How frequently do policies/models change?</p>	<p>Six levels of approval are needed. Policies are refreshed yearly.</p>
11.	<p>SARS requires 99.95–99.99% uptime and unplanned downtime resolution within 2 hours. Will SARS accept a tiered SLA model (e.g., P1 critical issues resolved in 2 hours, P2 in 8 hours, P3 in 24 hours), or does the 2-hour resolution requirement apply to all categories of unplanned downtime regardless of severity?</p>	<p>A tiered SLA model is acceptable; however, the specific SLAs will be determined during the contracting phase.</p>
12.	<p>What is the average and peak daily data change volume (inserts, updates, deletes) across source systems?</p>	<p>Refer to section 3.5 (a) of the BRS. The solution must be able to scale with SARS's data needs, accommodating growing volumes of data and metadata without compromising performance</p>
13.	<p>What is the estimated number of concurrent users expected to access data governance and master data services?</p>	<p>It is required that all SARS employees (approximately 14 000) are granted read-only access, section 4.4 (c) of the BRS</p>

#	Questions	Answers
14.	What are the expected query volumes, including average and peak loads, for both real-time and batch access patterns?	Yes, SARS requires real time access control management and monitoring. SARS does not have a comprehensive catalogue of data sources however critical data sources are identified.
15.	What latency requirements are expected for real-time data access and governance-related operations?	Refer to the BRS section 3.8 (k) and section 3.5(c).
16.	How many source systems are expected to be integrated at the initial phase.	Refer to the BRS, section 13. 13(g) and section 2 (h)
17.	What types of data sources are in scope (e.g. mainframe, databases, APIs, streaming platforms), and what are their relative data volumes?	Refer to the BRS, section 13.13 (g).
18.	What is the anticipated number of data quality rules, validations, and policy checks required at implementation?	Refer to the BRS, section 3.7
19.	What is the expected frequency of data quality monitoring and policy enforcement (real-time versus scheduled)?	Refer to the BRS, section 3.7
20.	What is the expected volume of governance workflows (e.g. approvals, remediation tasks) per day or month?	Refer to the BRS section 3.10.
21.	What percentage of governance processes are expected to be automated versus manually handled?	Full automation as per the requirements.
22.	Beyond read-only users, how many active users are expected across roles such as data stewards, administrators, analysts, and governance teams?	Refer to the BRS section 4.3 (a)
23.	What level of access control granularity is required (e.g. row-level, column-level, attribute-level), and how widely should it be applied across datasets?	Refer to the BRS section 4.3 (a) and section 3.8 and all three granularity levels are required and must be supported natively by the platform.
24.	What are the expected service level requirements in terms of	Refer to the BRS Section 4.2 and section 4.3 (a)

#	Questions	Answers
	system availability, response times, and throughput?	Bidders must declare measured throughput on a like-for-like reference deployment and indicate horizontal-scaling capability to grow without re-architecture.
25.	What data retention and historical tracking requirements apply to master data, metadata, and audit logs?	SARS data retention policies may communicate at contracting state.
26.	Which use cases are considered latency-critical versus those that can operate using near-real-time or batch processing approaches?	The latency-critical are referenced in the BRS, section 3.5 (c) and 3.14
27.	<p>Clarification is requested on the requirement to provide proof of solution ownership or authorised/accredited partner, distributor, or reseller status for the proposed platform.</p> <p>In a scenario where the bidding entity does not directly hold the reseller/authorization status, but has a confirmed partnership arrangement with a third-party entity that is the officially authorized reseller of the proposed solution, and where such authorization proof is available in the third party's name:</p> <ul style="list-style-type: none"> ▪ Would SARS accept such an arrangement, provided the third-party authorized entity is formally included in the bid structure (e.g., as part of a joint venture or equivalent compliant bidders structure)? ▪ Alternatively, does SARS require that the bidding entity itself must directly hold the reseller/authorization status, with supporting evidence issued in its own name? <p>We note the requirement that subcontracting is not permitted and would appreciate clarity on how such arrangements should</p>	<ul style="list-style-type: none"> ▪ SARS requires the bidder to be the Solution owner and to furnish us with proof of such, alternatively SARS requires the bidder to be an authorised reseller/ partner of the Solution owner. ▪ If the proposal is submitted by an incorporated joint venture, the incorporated joint venture is required to submit proof of authorization or accreditation of the joint venture. If the proposal is submitted by an unincorporated joint venture / consortium arrangement, any party of the unincorporated joint venture / consortium can submit proof of authorization or accreditation of each of the parties to the arrangement.

#	Questions	Answers
	be structured to remain compliant.	
28.	Please can you clarify if the RFP 07/2026 is a new RFP or a reissued RFP that was published last year 2025.	In 2025 SARS issued a request for information RFI 02/2025. RFP07/2026 is a new request for proposal.
29.	Regarding the SBD 3.1 / 3.2 / 3.3 document / section for the above-mentioned RFP; please may you provide us with the SBD 3.1 / 3.2 / 3.3 section as it is not within the tender documents that we have.	SBD 3.1/3.2/3.3 reference the pricing schedule and are encompassed within the annexure referenced as SARS RFP 07-2026 5-1 Master Data and Data Governance Solution Price Template.