South African Revenue Service

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

Questions & Answers

Communication 4/4

Please note: The first to the third set of questions and answers published are included at the tail end of this document.

#	Questions	Answers
97.	i. Are bidders allowed to subcontract? ii. What percentage of the work are bidders allowed to subcontract? iii. We would need 3-4 resources from the OEM partner for the implementation phase, would we be required to reflect that as a subcontracted portion of the project? iv. Will references of the OEM partner be permitted?	i. Subcontracting of implementation services is not permitted. The bidder must demonstrate the in-house capability and certified resources to deliver the implementation, training and post-implementation support directly. ii. SARS accepts Joint-Venture relationships. Refer to section 8.1.2 of the Main RFP document iii. A valid Partnership between the Bidder and the OEM is not classified as a sub-contracting arrangement and as a result not subject to the exclusion of subcontractors. iv. SARS will accept references from the bidding entity that prove the bidder's own history as a solution provider and will not accept the references of a third party.
98.	**MDM assumptions for SARS' confirmation:** **i. SARS has siloed data stores any of which can have elements, or be complete duplicates, of a master data entity (the entities).** SARS operates multiple data stores across its enterprise landscape — spanning departments, systems, and technology generations — each of which manages its own representation of core master data entities (such as taxpayer records, legal entities, addresses, or financial accounts).	Details regarding the assumptions may be confirmed at contracting stage.

#	Questions	Answers
	These stores have evolved independently, meaning the same logical entity (e.g. a registered taxpayer) may be partially or fully represented in more than one system. We assume this structural siloing is a known characteristic of the SARS environment, and that there is no single authoritative, enterprise-wide record for these entities today. ii. **Those stores receive updates to the entities independent of the other data stores.** Each data store receives updates to master data entities through its own operational processes, without those changes being propagated to, or reconciled with, other stores holding the same or related data. This means that at any point in time, the same entity may carry different attribute values across systems — for example, a taxpayer's address or contact details may be current in one system but outdated in another. We assume there is no existing real-time or batch synchronisation layer that keeps these stores aligned, and that reconciliation today is either manual, partial, or absent. iii. **There is knowledge or suspicion of duplication of entities, or records within an entity, within any one data store.** Beyond cross-system duplication, we assume there is awareness — or at least a reasonable suspicion — that individual data stores themselves contain duplicate records for the same logical entity. This may have arisen through data entry errors, system migrations, bulk data loads, or the	

#	Questions	Answers
	absence of robust uniqueness controls at the point of data capture. These intra-system duplicates represent a data quality challenge in their own right, and any MDM solution must be capable of detecting, scoring, and resolving them within a single source as well as across sources. iv. **The data types, table width and other technical features of data entities in each operational system is different though they may logically be the same entities across data stores.** While different operational systems may logically hold the same type of master data entity, their physical implementations differ materially. This includes differences in data types (e.g. date formats, numeric precision, character encoding), schema width (number and naming of fields used to represent an entity), and other technical characteristics such as null handling, key structures, and encoding conventions. We assume that no two systems store master data in an identical technical format, and that a significant data harmonisation and canonical modelling effort will be required to establish a unified entity representation across sources. v. **The bulk of operational systems are on-premise and SARS' Mainframe is a key operational system.** The majority of SARS' operational systems are hosted on-premise within SARS-managed infrastructure, with limited	

#	Questions	Answers
	reliance on cloud-hosted platforms for core transactional processing. Critically, SARS' Mainframe is understood to be a key operational system — likely holding high-volume, high-integrity records that are central to tax administration. We assume that any MDM solution must be capable of integrating with Mainframe data sources using appropriate connectivity mechanisms (e.g. bulk extract, EBCDIC decoding, or direct DB2/ADABAS access), and that Mainframe processing constraints (batch windows, resource governance) will be a material design consideration. vi. **It is operationally possible and reasonable to access all data from the sources and write back to them.** We assume that it is both technically feasible and operationally sanctioned for the MDM solution to read data from all relevant source systems and, where required, to write resolved or enriched master data back to those systems. This assumption underpins a style of MDM that goes beyond passive profiling — enabling active survivorship, golden record distribution, and source system correction. We note that this assumption carries significant dependency on system availability, API or interface readiness, and business process alignment. If write-back is constrained for any system — for example due to operational risk appetite — this will shape the chosen MDM architecture and should be clarified early.	
99.	**Mainframe Integration**	Combination of both is required.

#	Questions	Answers
	Is real-time integration with ADABAS required or is near-real-time / batch acceptable?	
100.	**Deployment & Hosting Model** What is the expected project duration for initial go-live?	Information relating to this may be shared at contracting phase.
101.	**Support** Is after-hours support (24×7) expected for production?	Yes, as per the BRS section 4.2 (b).
102.	**Reporting** i. What level of reporting requirements is expected? ii. As Fabric is already in-place, can we consider PowerBI for reporting? iii. How many KPIs / scorecards are required per domain?	Reporting requirements – refer to the BRS section 3.3 (c). 3.7 (a), 3.9 (d) and 3. 11 SARS will not prescribe the software solutions.
103.	**Infrastructure** Can SARS clarify disaster recovery requirements including RTO and RPO expectations for the solution?	Information relating to this may be shared at contracting phase.
104.	What are the key challenges currently faced in implementing or managing Master Data Management (e.g., data quality issues, system silos, governance gaps, or integration constraints)?	Refer to BRS as the requirements are a mirror of the current challenges.
105.	Is there a requirement to capture data in the local language?	Solution must be provided in English.
106.	How many DQ rules will be required per domain?	Information relating to this may be shared at contracting phase.
107.	**Data Governance** Is there any policy standards which are followed? e.g. GDPR, GxP etc.	Yes, refer to section 2 (b) of BRS
108.	**Data Governance** Is audit history and trend analysis required for DQ metrics?	Refer to section 3.8 (j) of BRS
109.	**Data Governance** Are there critical data elements identified? If yes what are the	Information relating to this may be shared at contracting phase.

#	Questions	Answers
	details? How many critical data elements (CDEs) are identified per domain?	
110.	**Known Issues** What are the known data quality issues today?	Refer to BRS section 2 (d)
111.	**Data Security Questions** What is the primary goal of implementing data masking?	Refer to BRS section 3.8
112.	**Data Security Questions** What are the use cases for masking data? Eg. Testing/Development, Analytics, Training, Third-party access	Refer to BRS section 3.8
113.	**Data Security Questions** Where is sensitive data located? E.g. Databases, Data lakes, Flat files, Cloud storage, SaaS applications	Information relating to this may be shared at contracting phase.
114.	**Data Security Questions** What environments require data masking? E.g. Development, QA, UAT, Production (Dynamic Masking)	Information relating to this may be shared at contracting phase.
115.	**Data Security Questions** Confirm if Azure AD (Entra ID) is the standard identity provider	Yes, it is the standard identity provider.
116.	**Training** Is formal training certification required for the 20 super users and 100 TTT users identified in the RFP?	Please refer to the BRS section 4.3 (a)
117.	**Payments** Can you please confirm payment terms?	Prospective bidders are to note that SARS will effect payments on an annual basis. There will be no upfront payment for the full contract term. Please refer to note 9 of the Pricing template.
118.	**Requirement 3: Solution Platform / Single Platform Architecture** Please clarify whether SARS will accept an integrated solution	▪ SARS is procuring a single-platform solution. The successful bidder must directly deliver all in-scope MDM, Data Governance, Metadata Management,

#	Questions	Answers
	where Profisee provides the core Master Data Management capabilities and Microsoft Purview provides enterprise Data Governance, Catalogue, Metadata Management, Classification, Glossary and Lineage capabilities; or whether all capabilities must be delivered by a single OEM product on one common codebase.	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 third) are not aligned with the single-platform requirement of BRS Section 3.13 and will not be accepted.
119.	**Requirement 3: Definition of "Single Platform** Please confirm whether "single platform" refers to one OEM product/codebase, one integrated technology framework, or one end-to-end solution delivered and supported by a single prime bidder.	▪ SARS is procuring a 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 third) are not aligned with the single-platform requirement of BRS Section 3.13 and will not be accepted.
120.	**Requirement 3: Common Codebase / API Restriction** The RFP states that the solution should not consist of separate systems connected by APIs. Please clarify whether this restriction applies only to internal product modules, or whether it also applies to integrations with enterprise platforms such as catalogues, identity providers, reporting tools and existing SARS systems.	▪ SARS is procuring a 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 third) are not aligned with the single-platform requirement of BRS Section 3.13 and will not be accepted.
121.	**Requirement 3: Evaluation of Integrated MDM and Data Governance Solutions** If an integrated Profisee and Microsoft Purview solution is proposed, will SARS evaluate the combined solution against the technical	▪ SARS is procuring a 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.

#	Questions	Answers
	requirements, or must each requirement be met by the core MDM platform alone?	▪ The bidder must have met the mandatory requirement of a single solution platform to be able to move to the evaluation phase. ▪ The solution must be a single platform. ▪ Multi-vendor integrated stacks (for example, a separate data catalogue product from one vendor combined with an MDM hub from another, integrated through a third) are not aligned with the single-platform requirement of BRS Section 3.13 and will not be accepted.
122.	**Requirement 5: Hybrid Deployment Model** Please confirm whether SARS will accept a hybrid architecture where selected components are deployed on-premises or in SARS-controlled infrastructure, while governance and catalogue capabilities are provided through Microsoft Purview cloud services hosted in compliant South African data centre regions.	Please refer to the BRS section 3.13 (d)
123.	**Requirement 4: Mainframe ADABAS Integration** Please confirm whether SARS will accept ADABAS integration through approved connectors, middleware, integration runtimes or mainframe data access layers, provided the bidder supplies technical evidence of connectivity, protocols, data flow and metadata flow.	Please refer to the BRS section 3 .13 (g)
124.	**BRS Section 3.1: Data Virtualisation** Please clarify whether Data Virtualisation must be a native capability of the MDM/Data Governance platform itself, or whether it may be provided through integration with SARS's existing data platforms or approved data virtualisation services.	▪ SARS is procuring a 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.
125.	**With reference to Section 7.4 (Technical Evaluation Criteria), Clause 10.3 (Page 24), which states that "the bidder must**	i. It does not include cloud hosting providers ii. Refer to question 97

#	Questions	Answers
	deliver all required services directly and not rely on subcontractors for any aspect of the implementation process", kindly confirm: i. Whether "no subcontracting" includes cloud-hosting providers (e.g., use of hyperscalers for infrastructure services), and' ii. Whether this also includes local support or implementation partners.	
126.	Please confirm the use of local South African partners for support, implementation, or operational activities would be considered subcontracting under this clause?	Refer to question 97
127.	Are local South African resources mandatory for project delivery and ongoing support? If so, please clarify the expectations in this regard or any minimum requirements or expectations in this regard.	SARS requires for a service provider to be available to provide ongoing service locally throughout the duration of the contract.
128.	How many named users (i.e full platform capabilities) of the DG/DQ component are needed?	Please refer to the BRS Section 4.3
129.	How many named users (i.e full platform capabilities) of the MDM component are needed?	Please refer to the BRS section 4.3
130.	What is the expected number of data stewards, analysts, business users, and administrators that will actively use the platform, beyond the ~14,000 read-only users referenced in the BRS?	Please refer to the BRS section 4.3
131.	Is the implementation expected to be enterprise-wide from day one, or phased by domain? Will SARS share the BRS roadmap and target go-live date?	Information relating to this may be shared at contracting phase.
132.	Should cleansing functionality operate directly on source systems, or on a staging/governed layer within the MDM platform?	Information relating to this may be shared at contracting phase.

#	Questions	Answers
133.	Preference Points Claim Form: A large entity that that forms a joint venture with the 51% black owned Exempted Micro Enterprise (EME). We are a B-BBEE 1 organisation and have the capability to deliver with local EME's per procurement guidelines. Could you please clarify if we can claim the points with a teaming agreement with South African EMEs?	Refer to section 7.5.4.5 of the main RFP document.
134.	**General Conditions of Bid** While we agree to the intent of the GCC, there are few clauses that are not relevant to the scope of this RFP and/or needs discussions and agreements at a later stage. Is it permissible to highlight deviations to the GCC now without being non-compliant?	That the GCC is not open for negotiations, however, SARS will enter into a specific contract with the successful bidder in which parties can negotiate within the ambits of the law and SARS policies. Refer to section 7.8.1 of the main RFP document.
135.	**Mandatory Response Template** Do we need to replicate the same format for our solution proposal?	Each section of this Mandatory Requirement Response Template corresponds to a pre-qualification Mandatory Requirement outlined in the main RFP document. In Sections 1 to 4 of the template, bidders are required to indicate whether they comply or do not comply with each requirement and provide a clear reference to where the supporting evidence has been included in their submission pack. In Section 5, bidders are required to declare whether they comply or do not comply with the requirement. For the technical evaluation response, bidders are encouraged to align their responses with the order of the technical evaluation criteria and provide a table of contents for ease of reference. Bidders are reminded that, for a response to be considered valid, the Mandatory Requirement Response Template must be duly signed.
136.	Could SARS clarify whether Section 1 (Master Data Management)	Please refer to the BRS section 3.1 and section 3.13.

#	Questions	Answers
	requires a traditional MDM hub with persisted golden records, entity resolution and survivorship rules, or whether a virtualization/federation approach delivering a unified logical view across source systems satisfies the requirement? If both are expected, can SARS indicate which master data domains require physical mastering vs. virtual unification?	
137.	To properly size the integration approach, can SARS share: i. primary source systems holding master data entities ii. target deployment topology (on-prem, private cloud, hybrid) iii. any existing data catalogue, lineage or governance tooling already in place?	i. Please refer to the BRS section 3.13 (g) ii. Please refer to the BRS section 3.13 (d) iii. No.
138.	For pricing template completion, can SARS provide indicative figures for: i. number of master data domains and approximate record counts per domain ii. number of data stewards / governance team members vs. business end-users iii. number of metadata sources to be catalogued iv. data volumes under governance (TB) v. expected throughput requirements for real-time synchronisation?	i. Information relating to this may be provided at contracting phase. ii. Please refer to BRS to section 4.3 iii. Information relating to this may be provided at contracting phase. iv. Information relating to this may be provided at contracting phase. v. Information relating to this may be provided at contracting phase.
139.	Regarding the mandatory Mainframe ADABAS integration, does SARS currently utilize any middleware, Change Data Capture (CDC) tools, or messaging queues (e.g., Event streams) for its mainframe environment, or must the Bidder supply proprietary ADABAS adapters for direct direct-to-database connectivity?	Connection to the mainframe ADABAS must connect natively and not through middleware
140.	To accurately price the training and knowledge transfer phase, how	Please refer to the BRS section 4.3

#	Questions	Answers
	many super-users and end-users' does SARS estimate will be included in the initial 'train the trainer' program?	
141.	For the automated remediation requirement, what are SARS's boundaries for auto-healing? Is the proposed solution expected to automatically write corrected data directly back to the original1 source systems (such as legacy mainframes), or is remediation contained within the MDM/Virtualization layer?	SARS DGMDM solution should be a read only with source systems and remediation should be contained within the MDM/Virtualization layer.
142.	The RFP mentions that the enterprise license must align with 'SARS technology onboarding licenses.' Can SARS provide a copy of these onboarding license terms, or clarify the specific commercial conditions required to ensure our pricing model strictly adheres to this standard?	Information relating to this may be provided at contracting phase.
143.	**RFP Document Section 3.1 - Master Data Management** i. What are the core master data domains. How the data mastering process happens today? ii. Given that multiple sources such as Mainframe, SAP and SQL Server are involved, how will in-place updates be synchronised across systems without a common entity ID linking records across sources? iii. Do you expect data validation and enrichment to be performed within each source system at the point of entry, or should these processes be applied centrally before the data is distributed back to the source systems? iv. What are the sources that hold the master data for the core domains? v. Can you please list the Master Data Domains that are in scope for this program? For e.g., Taxpayer, Vendor,	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.

#	Questions	Answers
	Employee, Customs, Asset. Also please provide the priority of implementation for these domains vi. Among the listed systems (e.g., MAINFRAME, SAP, Microsoft Fabric, EDW, CMS), please share the priority of integrations that is acceptable for phased enablement. vii. Does the "no data migration" requirement apply to all domains, or are there scenarios where selective replication/caching is acceptable for performance or analytics?	
144.	**RFP Document Section 3.13 - Data Governance Integration Capabilities** i. The RFP mandates hybrid integration and SA-based data residency, can we assume Azure to the preferred cloud provider for hybrid deployments? If not, please specify. ii. Can SARS provide detailed documentation of existing system architectures, integration patterns, and current data residency constraints (especially for SAP, Microsoft Fabric, DB2, CMS, etc.) to ensure precise alignment and avoid design assumptions?	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.
145.	**RFP Document Section 3.2 - Data Cataloguing and Metadata Management** i. Are you planning to implement data governance capabilities such as data catalog, glossary and lineage using tools like Collibra or Alation? Would you like us to present alternative options as well? ii. Which data sources need to be catalogued (mainframe, SQL	i. The solutions should meet all the requirements as stipulated in the BRS section 3.2 ii. Data sources need to be catalogued pertaining all enterprise systems e.g., MAINFRAME, SAP, Microsoft SQL Server, Microsoft Fabric, DB2, My SQL, SARS CMS iii. Information relating to this may be provided at contracting phase iv. Information relating to this may be provided at contracting phase

#	Questions	Answers
	server, SAP etc have been mentioned, please provide a comprehensive list), and what is the expected scale (number of assets, domains, platforms)? iii. Do you already have defined data classification, masking and encryption schemes and policies, or should the solution support both designing and operationalizing them? iv. Are there existing enterprise standards or taxonomies (classification levels, glossary structures) that the solution must align with?	
146.	**RFP Document Section 3.3 - Visual Data Lineage and Impact Analysis** Since most data cataloguing tools (industry standard - Collibra / Alation) offer static lineage visualization, do you expect the solution to also provide native capabilities for forecasting and risk estimation related to proposed data changes?	The solution must provide mechanisms for automated and integrated metadata management and ensure data lineage and traceability. The solution must incorporate and facilitate both visual data lineage and robust impact analysis capabilities to ensure comprehensive oversight and management of data throughout its lifecycle
147.	**RFP Document Section 3.7 - Data Quality Management** i. Would the automated cleansing functions be defined and applied on the individual sources or do you expect to build a centralized rule repository? ii. Provide customisable reports summarising data quality trends, remediation activities, and compliance with organisational standards. Given that most off-the-shelf data quality tools lack native support for end-to-end, customisable management reporting, should this capability be addressed through extensions, integrations or a complementary solution?"	i. Access to source systems is read-only. ii. SARS will not prescribe the software solution.
148.	For the ADABAS integration, are there any specific protocol or	Information relating to this may be shared at contracting phase.

#	Questions	Answers
	performance requirements (e.g., latency, transaction per second target) that must be demonstrated in the test log?	
149.	Are there any maximum page limits for the Technical Narrative, Executive Summary, or any other sections (e.g., "no more than 10 pages for the Technical Solution")?	SARS will not prescribe the number of pages, but the evidence must meet the Mandatory Requirements.
150.	For the pricing template, are there any mandatory cost categories that must be broken out (e.g., licence, implementation, training, support, hosting, storage) and any caps on total cost?	Bidders must not change the Pricing Template. SARS may at its sole discretion disqualify the bid proposal in the event that the pricing template has been changed. Refer to note 8 of the Pricing template. Bidders may attach a separate letter relating to any clarifications or breakdown of their pricing proposal.
151.	**Data Management Needs** i) What are the data domains to be mastered? For e.g. Persons, Org, Products, Contracts ii) Are there any multilingual data? What languages? iii) Please share an approximate number of attributes per domain. iv) Could you specify the top 2 master data domains that are in-scope for this engagement? v) Do you expect concurrent use of Bulk/Batch and Realtime services to update master data with high throughput? vi) Is there a need to keep the existing data in source systems untouched while still maintaining a central registry for reference? vii) How important is it to quickly achieve a unified view of master data without making significant changes to the existing IT infrastructure?	Information relating to this may be shared at contracting phase.

#	Questions	Answers
	viii) Is there a strong need to gather and cleanse data from multiple sources into a single, consolidated repository? ix) Are you facing data quality issues that require data cleansing and standardization before usage? x) Do you require a read-only, centralized repository for analytics and reporting, while leaving the original source systems unchanged? xi) Is it essential to have a flexible approach that supports both centralized and decentralized data management needs? xii) How critical is it for your organization to support multiple versions of the truth for various business units or departments? xiii) Is there a requirement to have a single, authoritative source of master data that is tightly controlled and managed in one central location? xiv) Are you looking to significantly transform and centralize your data management practices, impacting all source systems? xv) Please share estimated data volumes per domain. xvi) Are delta loads expected? What is the frequency? xvii) How important is it to have a single version of the truth that is used by all business units and applications for both operational and analytical purposes? xviii) Do you need to maintain and manage master data across multiple systems in near real-time, ensuring consistency and synchronization? xix) How granular is the merge process? Record-level or cell-level?	

#	Questions	Answers
152.	**Integration and Interoperability** i. What are the different types of sources? (Databases, Files, XML, API, etc) ii. How many external partner systems need to be integrated? iii. What are the methods of integration (API, flat file, etc.) for each partner? iv. Are any third-party enrichment services required? v. What are the different type of Databases (both relational/non-relational) to be integrated to MDM? vi. Are there real-time or message-queue-based integrations? vii. Do you have information on the approximate no. of tables, columns that holds master data in the source systems? viii. What is the rough volume of data expected across each source systems? ix. Do you have the CDC tools to identify the changed data from sources and feed to MDM? x. Do you require real-time master data updates across any of your CRM and ERP systems? xi. What are the downstream integration points with MDM? How would MDM data be used by applications? xii. Are middleware components part of the integration stack? xiii. Was any data profiling exercise performed for any source systems, if yes pls share the profiling results. xiv. Is there a preference for on-premise or cloud based MDM or SaaS MDM? xv. Is there a preference for a specific database for MDM system?	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.

#	Questions	Answers
	xvi. Do you want Multi-tenant deployment and operation for the MDM solution?	
153.	**Data Governance & compliance** i) Who are the primary users of the MDM solution? ii) How is data quality currently managed (profiling, business rules, KPIs)? iii) What are their specific needs and expectations? iv) Is there an established data governance framework in place? v) What user interfaces and accessibility features are required? vi) Are there any specific data security or privacy challenges you face? Pls elaborate. vii) What data security measures need to be implemented for the MDM solution?	i. Refer to BRS 4.4. c) ii. Information relating to this may be shared at contracting phase. iii. The solution should be able to meet the requirements as stated in the BRS. iv. Yes, SARS has a Data Governance policy v. Refer to BRS 3.6 vi. Refer to BRS 3.8 vii. Refer to BRS 3.1.e and 3.8
154.	**Hierarchy and Relationship Management** i. Are there existing hierarchies implemented? If yes, please describe. ii. Are there any grouping use case? If yes kindly explain iii. Are any new hierarchies expected in the target platform?	The solution should be able to meet the requirements as stated in the BRS.
155.	**User Access and Roles** What is the expected number of concurrent users (average and peak)?	Refer to BRS 4.4. c)
156.	**Environments and Deployment** i) What cloud platform is preferred (AWS, Azure, GCP)? ii) Are there any geo-based deployment needs?	i. 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. ii. The cloud component must be deployed in a South African region to satisfy

#	Questions	Answers
		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.
157.	Do you have Oracle/SQL/DB2 database to be used to host data for reporting?	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).
158.	Are you looking for Advance Analytics such as Customer Advance Analytics, Product Advance Analytics e.tc.?	Refer to BRS 3.11
159.	What is the number of records per each domain?	Information relating to this may be shared at contracting phase.
160.	How many source systems?	Refer to BRS 3.2 (b) (ii)
161.	What are the types of source databases?	Information relating to this may be shared at contracting phase.
162.	Are you going to write back to source systems?	No.
163.	Do you have any timeline expectations?	Information relating to this may be shared at contracting phase.
164.	What is your Data Quality Tool to be used (or are you looking for introducing a new Data Quality tool)?	The proposed solution should have the capability for data quality.
165.	Do you have Oracle/SQL/DB2 database to be used to host data?	Information relating to this may be shared at contracting phase.
166.	What is the Size of Data and Number of Records are expected to be processed in the Master Domains and Reference Domain?	Information relating to this may be shared at contracting phase.
167.	How many source systems or down streams are integrated in below modes ▪ Batch ▪ Real time (web services) ▪ Near real-time (via ESB or any other middleware tool)	Information relating to this may be shared at contracting phase.
167.	Do you have any custom error-handling mechanisms for Informatica Batch job runs (batch groups)?	Information relating to this may be shared at contracting phase.
168.	Do you have any 3rd party job scheduling tool that is used to	Information relating to this may be shared at contracting phase.

#	Questions	Answers
	schedule the batch jobs?	
169.	What is the number of BES (Business Entity Services) configured in Provisioning tool?	Information relating to this may be shared at contracting phase.
170.	Do you have any custom error-handling mechanisms for BES requests and responses?	Information relating to this may be shared at contracting phase.
171.	Is ActiveVOS used for workflow management? If yes, how many workflows are configured?	Information relating to this may be shared at contracting phase.
172.	How many Hierarchies are configured?	Information relating to this may be shared at contracting phase.
173.	Do you have source specific landing tables? If yes, then is raw source data available in source specific Landing tables (including the volume for Initial Data Load and Incremental Loads till now)?	Information relating to this may be shared at contracting phase.
174.	How many Base objects are configured in Informatica Hub Console?	Information relating to this may be shared at contracting phase.
175.	Is any 3rd party ETL tool used to load data into Landing?	Information relating to this may be shared at contracting phase.
176.	Is any 3rd party DQ tool used to handle data standardization, cleansing?	Information relating to this may be shared at contracting phase.
177.	Pls enlist the day-to-day activities performed by your Data Stewardship team on Informatica Data Director or Customer 360?	Information relating to this may be shared at contracting phase.
178.	How many Match Rules are configured? Is fuzzy matching enabled?	Information relating to this may be shared at contracting phase.
179.	Do you have Decay enabled for any source system (for the Survivorship setup)?	Information relating to this may be shared at contracting phase.
180.	Do you have Cell Data Survivorship or Record level survivorship configured on Informatica Hub console for BVT (Best Version of the Truth)?	Information relating to this may be shared at contracting phase.
181.	Are there any user exits configured? If yes, pls enlist at which level i.e. i. Stage Process	Information relating to this may be shared at contracting phase depending on the bidder's proposed solution.

#	Questions	Answers
	ii. Load Process iii. Match Process iv. Merge Process v. Un-merge Process	
182.	What should be the rollout sequence across market segments (Individuals, SMMEs, Large Business)? Also, which domain should be prioritized as the anchor for the MDM implementation—Taxpayer or Customs?	Information relating to this may be shared at contracting phase.
183.	What is the SARS existing on-premises Integration tool/Layer?	Information relating to this may be shared at contracting phase.
184.	i. What is the version of Adabas mainframe platform? ii. What is the operating system its runs on?	Due to security reasons, the detail information regarding the mainframe operating environment will be shared at contracting phase.
186.	Section 3.1 in BRS talks about the Master Data Management Integration only. Hence Presuming that Data Integration for Data warehouse, Data Lake is NOT in the scope of this RFP. Is this correct understating?	Information relating to this may be shared at contracting phase.
187.	Under section 3.13 in BRS could you please list down other source applications, DBs for the MDM and Data Catalog integration scope other than ADBAS MAINFRAME, SAP, Microsoft SQL Server, Microsoft Fabric, DB2, My SQL listed in point g of section 3.13 of BRS	Information relating to this may be shared at contracting phase.
188.	Need to know total number envisaged Natural and legal business entities? Please provide the count (volumetrics)	Information relating to this may be shared at contracting phase.
189.	Why is SARS only considering Registry style MDM? Why not Coexistence Style or Centralized Styles which could be better for Master Data Management?	Registry style MDM aligns with SARS' strategic architecture.

#	Questions	Answers
190.	What is the total number of attributes across all entities in one domain?	Information relating to this may be shared at contracting phase.
191.	**Data Encryption** i. What are the major applications and platforms in scope? ii. What are the primary business use cases for encryption and data protection? iii. What type of encryption is required (Data at Rest, Data in Transit, Field-Level Encryption, File Encryption, Database Encryption)? iv. Is format-preserving encryption (FPE) required or in place? v. Is there existing encrypted data that must be migrated? vi. Which data elements are in scope for encryption? vii. Are structured, semi-structured, and unstructured data all in scope? viii. Which databases, filesystems, applications, or cloud services require encryption? ix. Are customer-managed keys (CMK/BYOK) required? x. Is integration with HSM or cloud KMS required?	Information relating to this may be shared at contracting phase. SARS has extensive information protection and security policies and standards. Please refer to BRS section 3.8
192.	**Data Catalogue Scanners** i. What are the various SAP ERP applications in scope for Data Cataloguing? Name them. ii. The Various RDBMS listed in the BRS (MS SQL Server, DB2, MySQL) hosted on cloud or on-Prem has DB scripts/Objects? E.g., PLSQL scripts? iii. List down the various Mainframe applications in scope	Due to security reasons, the detail information regarding the SARS applications and database portfolio will be shared at contracting phase.

#	Questions	Answers
	(Adabas etc.)	
193.	**What will be the maximum amount of Data Governance Business Assets maintained during the contract period? (see context below)?** **I**n other words, how many Business Glossary Terms, Data (sub) Domains, ML Models, Policies, Business Processes, Data Sets, Systems, or Interfaces would SARS see in SARS governance solution for SARS business audience? These are, in essence, human-defined/curated, low-volume, high-per-record utilization business metadata, with the exception of the intertwined relationships. This amount generally sums up from a few hundreds to a few thousands of Business Assets.	SARS requires a scalable solution that will meet the business need. Please refer to BRS section 3.5
195.	**What is the maximum amount of Data Catalogue Technical Assets maintained during the contract period? (see context below)** SARS need to maintain during the contract period. In other words, how many machine-generated Database Schemas or Tables, .json files, BI Reports, Data Quality Rules, Database Views or Database Columns Attributes would SARS expect to need to scan in total? These are machine-generated, as a result of the scanning processes, high in volume, and low per-record utilization, in other terms are the technical metadata coming from the entire data landscape SARS wish to generate metadata on. We see 20-40.000 assets per resource as an acceptable standard.	SARS requires a scalable solution that will meet the business need. Please refer to BRS section 3.5

#	Questions	Answers
	This amount can range from hundred thousand to millions.	
196.	How frequent would SARS need to have the identified data sources scanned or profiled?	SARS requires a scalable solution that will meet the business need. Please refer to BRS section 3.5
197.	What frequency would SARS see fit i.e. Is a daily processing, weekly, bi-weekly, monthly or bi-monthly cadence?	SARS requires a scalable solution that will meet the business need. Please refer to BRS section 3.5
198.	How many Data Marketplace Assets would SARS expect to have on the marketplace, where all SARS users can shop for data?	Information relating to this may be shared at contracting phase.
199.	Does this include actual marketplace categories, CDGC Metadata Assets (Table, File, Data Set, ML Model), Data collections (Packaged, merchandisable, orderable, deliverable, package of data assets).	Information relating to this may be shared at contracting phase.
200.	How many data consumers (Data Scientists/Data Engineers/Data Analysts/BI Users/Report Consumers), does SARS expect to have shopping for data through the Marketplace?	Information relating to this may be shared at contracting phase.
201.	Data Masking/Tokenization – How many total numbers of technical assets will be going through the Masking and Tokenization?	SARS requires a scalable solution that will meet the business need. Please refer to BRS section 3.5
202.	With regards to the Bid Submission, is Docusign acceptable for signatories no local to Johannesburg.	SARS requires duly sign all relevant documents; however, the method by which the bidder ensures compliance remains at their discretion.
203.	Does this solution need DC-DR setup?	Yes, the solution needs DC-DR setup.
204.	Should MDM act as a golden record/trusted reference layer, or become the system of record for any domain?	Information relating to this may be shared at contracting phase.
205.	If master data stays in the source systems, what should SARS consider the enterprise “trusted view”—a consolidated set of key attributes (e.g., name, identifiers, address, contact), with other details remaining in source systems? If yes, i. What is the minimum set of attributes that must be	Information relating to this may be shared at contracting phase.

#	Questions	Answers
	standardized and shared enterprise-wide for each domain? ii. At go-live, does SARS expect an initial baseline onboarding of master data to establish the trusted view (e.g., consolidate and align records), and should the solution retain a source reference showing which source records contributed to each trusted record for audit and traceability? iii. When a new master entity is created (e.g., new taxpayer/business/party), which system should users use to create it in day-to-day operations—an existing source system, or a centralized process using the new solution (even if it writes back to the source)? iv. If a record is created in Source System, before creating a new record, should users be expected to search for an existing trusted record to prevent duplicates (e.g., "search-before-create"), and if a possible match is found, what should the required business action be (reuse, link, escalate to steward) v. How should change approvals work, i.e. ▪ Option A (approve-then-apply): A change is proposed → reviewed/approved → then applied to the source system(s). ▪ Option B (apply-then-review): A change is applied in the source system → reviewed afterwards; if rejected, how should SARS handle it (revert, corrective ticket, override process)?	
206.	In steady state, should source-system updates flow through as-is, or should certain updates require a formal approval step in the	Information relating to this may be shared at contracting phase.

#	Questions	Answers
	governance/MDM solution (e.g., changes to identity/legal name vs contact details)?	
207.	For key attributes (e.g., name, address, identifiers, contact details), which system should be treated as the authoritative owner when there are conflicts between sources (and who decides the survivorship rule)?	Information relating to this may be shared at contracting phase.
208.	Does SARS already have documented data quality rules and thresholds for the master domains, or should these be defined collaboratively through workshops during implementation?	Information relating to this may be shared at contracting phase.
209.	Does SARS expect data profiling on source systems at the start of the project to baseline quality (duplicates, completeness, inconsistencies), or should profiling be limited to the consolidated/trusted view? i. What rollout approach does SARS prefer—phased rollout (by domain/module/site) or a single go-live? ii. Should capabilities be delivered all at once, or in a planned sequence (e.g., catalog/glossary first, then quality, then mastering/sync)? iii. Should the supplier deliver only blueprinting/solution design, or also full implementation (configuration, integrations, rollout, training, and post go-live support/change management)? iv. Does SARS have an existing data dictionary / business glossary for master data, or should it be created as part of the program?) v. Are there strong business drivers for the customer to embark on the MDM initiative (Sample discussion starters – Specific	It is expected that the supplier must provide a transition strategy/approach at the contracting phase. i. Information relating to this may be shared at contracting phase. ii. Information relating to this may be shared at contracting phase. iii. Please refer to BRS sections 2 and 4 iv. Currently SARS does not have a fully integrated automated solution as specified in the BRS. v. Information relating to this may be shared at contracting phase. vi. 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. 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. vii. SARS has got a suite of integration solution and infrastructure for 3rd party data sources.

#	Questions	Answers
	business use cases? vi. Does the customer envisage having a single instance of the Hub or will there be data federation over different instances across LoB-s / regions (as the case maybe)? vii. Is there any 3rd party data source or data service that needs to be integrated i.e. for financial systems, integrating data from sources like Bloomberg. Reuters is common practice.	
210.	Does the customer envisage an integration of MDM with a downstream reporting / analytics tool?	Yes.
211.	Is there a need for customizations on the User Interface provided by COTS products?	Please refer to the BRS section 3.6
212.	Does the customer currently have a Data Stewardship / Governance structure in place? Which roles are currently staffed by customer personnel and will continue as such?	Information relating to this may be shared at contracting phase.
213.	Will MDM Solution exposed API be leveraged extensively? i. Is any data on API Throughput expected? (Create/Search/Update)	Yes, they will be leveraged. Please refer to the BRS section 3.5 for performance expectations.
213.	Is there a need to restrict access – i.e. Business unit, geography, etc by data steward segments and/or users?	Please refer to the BRS section 3.1 (e)
214.	Is this a valid assumption that, the MDM Hub will have super user experience screens will be English only, while, the data to be viewed in the screen will be AS-IS (as entered in local languages)?	SARS expects the solution to be in English and the data to be presented AS-IS (regardless of language).

<table>
<tr><th>#</th><th>Questions</th><th>Answers</th></tr>
<tr><td></td><td>To inform the subscription and licensing model would it be possible to let us know the volumes expected (as below):
i. For each domain, what is the estimated number of consolidated records?
ii. What is the expected annual growth percentage for these records?

<table>
<tr><th>Master Domain</th><th>Year0 (Consolidated Record) i.e., actual master records which will be mastered after consolidation) across all sources</th><th>Year1
% of YoY growth</th><th>Year2
% of YoY growth</th><th>Year3
% of YoY growth</th><th>Year4
% of YoY growth</th><th>Year5
% of YoY growth</th></tr>
<tr><td>Customer (B2B) – Corporate Taxpayers</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Customer (B2C) – Individual Taxpayers</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Customer (B2B) – Non-Corporate Taxpayers Trust, NGO, Any Non-Profit Organizations</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Other Artificial Judicial Person (AJP)</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Reference Data Records</td><td>How many Consolidated Records (Cumulative) are estimated across all Reference business entities within the system?</td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td>Please add any other domains you would like to consider in Phase 1</td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
</table>
</td><td>SARS does not envisage a solution that is premised on a licensing model that charges per data object managed.

The supplier must ensure that their pricing structure is inclusive of the following items and supported by a cost breakdown.

▪ SARS requires an enterprise license in accordance with the Supplier's licensing model in alignment with the SARS technology onboarding licenses.
Detailed pricing structure, including licensing fees, implementation costs, training, and ongoing support/maintenance.
▪ SARS requires a subscription pricing model.
▪ It is required that all SARS employees (approximately 14 000) are granted read-only access.
▪ Inclusion of compute once off costs subscription
▪ Storage costs – once off and subscription
▪ Any other technical (networking) costs</td></tr>
<tr><td>215.</td><td>Data Masking/ Tokenization
How many total numbers of technical assets will be going through Masking and Tokenization?</td><td>Information relating to this may be shared at contracting phase.</td></tr>
<tr><td>216.</td><td>Solution
Can SARS clarify whether bidders may present more than one compliant solution approach or configuration to address the requirements, or if a single proposed solution approach is expected only?</td><td>SARS requires that bidders propose a single solution that best meets the stipulated requirements.</td></tr>
</table>

#	Questions	Answers
217.	We understand and acknowledge that the RFP prohibits subcontracting for any aspect of implementation and post-implementation support. This is highlighted in your response to Question #5 in Communications 1/3. However, for our authorized solution resellers, they will be reselling & delivering the IBM solution which includes the technology platform and associated services. The bidder (authorized IBM solution partner/reseller) remains the prime contracting entity accountable to SARS. No other service providers or technology vendors will be included in our proposals. We believe this conforms with your “single-vendor, single-platform solution” as well as your response to Question #27 in Communications 1/3 which states that “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 authorized reseller/ partner of the Solution owner”. Can you please confirm?	SARS acknowledges the market landscape, recognising that some service providers own the solutions they offer, while others operate as resellers. The requirement stipulates that service providers who own their solutions must provide evidence as outlined in Mandatory Evaluation Criteria 2: Solution Implementor Relationship. Similarly, service providers acting as resellers, partners, or distributors must submit the evidence specified under the same mandatory criterion.

Communication 3/4

#	Questions	Answers
49.	Would a financial statement capturing Annual Turnover, Total Assets, Current Assets, Total Liabilities, and Current Liabilities suffice?	No – We need the complete set of the annual Financial Statements. Refer to the Main RFP document section 7.6 for reference.
50.	If we have the CIPC registration documents, do we still need to provide a letter from an attorney or registered accountant on their letterhead?	No – the CIPC registration document will suffice
51.	Will an invoice from the procurement team of an EME or QSE suffice as supporting evidence to substantiate points claimed under SBD 6.1, Section 4.2?	Yes - together with proof of payment of the invoice.
52.	On SBD 6.1, Section 4.2, the requirement states that a large entity forms a joint venture with a 51% black-owned Exempted Micro Enterprise (EME). Is this mandatory for this bid?	No – It is not mandatory for this bid, and it is not a disqualifying requirement.
53.	Who is the current cloud service provider for SARS, and will bidders be allowed to utilise the same cloud provider? Can we assume that the solution can/will run on SARS current cloud infrastructure?	▪ 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

#	Questions	Answers
		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. 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.
54.	Can bidders assume that SARS on-premises infrastructure will be available for use?	SARS on-premises infrastructure will be available for integration.
55.	What contribution, if any, will SARS provide towards storage and hosting infrastructure?	Refer to BRS section 3.13
56.	What is the preferred Data Virtualization software for SARS?	SARS has no preference for data virtualisation software. Bidders can propose their preferred software.
57.	The BRS states that data must be stored in a South Africa-based data centre. Can metadata (only) be stored outside South Africa (e.g., in the EU region)?	No.
58.	Does the overall solution need to be highly available?	Yes, the solution needs to be highly available. Section 4.2 (b) of the BRS
59.	How many environments are in scope (e.g., Development, Test, UAT, Production)?	The scope should include three steps (development, test and Production)
60.	Is a Disaster Recovery (DC-DR) setup required for this solution?	Yes, disaster recovery set up is required.
61.	Do SARS transactional systems include mainframe platforms (e.g., Adabas, DB2), and do these require real-time data replication?	Please refer to the BRS section 3.14.
62.	Is Data Integration within scope, or is it already being handled via Microsoft Azure or Microsoft Fabric?	The scope of integration is outlined in the BRS section 3.1 (a) and section 3.13

#	Questions	Answers
63.	If Data Integration is in scope, what is the total number and types of CDC source databases?	The scope of integration is outlined in the BRS section 3.1 (a) and section 3.13
64.	What is the estimated daily peak CDC load (in GB)?	Please refer to section 3.1 (a) of the BRS.
65.	What is the required data retention period for staging CDC transactions or condensed files?	Please refer to section 3.1 (a) of the BRS.
66.	What is the expected daily data processing volume for Data Integration (in GB)?	Please refer to section 3.1 (a) of the BRS.
67.	What is the estimated one-time data load volume?	Please refer to section 3.1 (a) of the BRS.
68.	What is the expected year-on-year data volume growth (%)?	Please refer to section 3 5 of the BRS
69.	What are the source and target system types required for data ingestion?	Please refer to section 3.1 (a) of the BRS.
70.	What data formats are in scope for Data Integration?	Please refer to section 3.1 (a) of the BRS.
71.	Does SARS have an existing MS Azure Data Lake? If so, how are pipelines currently implemented (e.g., ADF, Databricks, MLflow)?	Due to sensitivity, more information relating to this may be shared at contracting phase.
72.	What are the current challenges with the Data Lake and Data Warehouse environments?	The requirements of the specification are a solution to SARS current challenges.
73.	What is the expected volume of data processed for data quality (in GB)?	Due to sensitivity, more information relating to this may be shared at contracting phase.
74.	What is the expected one-time data quality processing volume (in GB)?	Due to sensitivity, more information relating to this may be shared at contracting phase.
75.	How much data will be profiled per month (in GB)?	Information relating to this may be shared at contracting phase.
76.	What is the frequency of data profiling and data quality execution?	Information relating to this may be shared at contracting phase.
77.	What is the expected data duplication/matching volume per month (in GB)?	Information relating to this may be shared at contracting phase.

#	Questions	Answers
78.	What is the expected periodic data quality processing volume per run (in GB)?	Information relating to this may be shared at contracting phase.
79.	How often should Data Quality scorecards be updated (daily, weekly, monthly, or quarterly)?	Information relating to this may be shared at contracting phase.
80.	Which SAP ERP applications are in scope for data cataloguing?	Information relating to this may be shared at contracting phase.
81.	Do the RDBMS systems (SQL Server, DB2, MySQL) include database scripts/objects (e.g., PL/SQL)?	Yes, they do, however their inclusion in governed artefacts is at SARS discretions
82.	Which mainframe applications are in scope (e.g., Adabas)?	Please refer to the BRS section 3.13 (g)
83.	What is the expected number of business governance assets (e.g., glossary terms, policies, processes, datasets)?	Information relating to this may be shared at contracting phase.
84.	What is the expected number of technical catalog assets (e.g., tables, schemas, reports)?	In terms of the BRS, the solution must be equipped with robust functionality to catalogue metadata through automated discovery methods. The number of technical catalogue assets will thus be determined by the outcome of this.
85.	What is the required frequency for metadata scanning (daily, weekly, monthly)?	The solution must possess advanced capabilities for automatically identifying and categorising metadata.
86.	How many data marketplace assets are expected?	Information relating to this may be shared at contracting phase.
87.	How many data consumers are expected to use the data marketplace?	Please refer to the BRS section 4.4 (c).
88.	How many technical assets will require masking or tokenization?	Information relating to this may be shared at contracting phase.
89.	Which master data domains are in scope?	Information relating to this may be shared at contracting phase.
90.	Which domain should be prioritised for Phase 1?	Information relating to this may be shared at contracting phase.
91.	Which systems will provide and consume MDM data?	Master data is provided by the SAP ERP system and other core tax systems (turnkey mainframe and client-server solutions), and the resultant MDM data will be consumed in data governance, analytics and made available as consistent data to internal use cases. Please refer to BRS section 2, and 3.1
92.	Must mastered (golden) records reside strictly within South	Please refer to BRS section 3.13 (e).

#	Questions	Answers
	Africa?	
93.	What deployment model is preferred for MDM (cloud, on-premises, or hybrid)?	Please refer to the BRS section 3.13 (d).
94.	Is real-time or batch synchronization required?	Please refer to the BRS section 3.11 (a)
95.	Should MDM act as a golden record layer or as a system of record?	▪ 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.
96.	Should relationships between mastered entities be managed (e.g., taxpayer-to-company, employer-to-employee)?	The solution must provide data model management capabilities, enabling the definition, visualisation, versioning, and governance of master data models to ensure alignment with business requirements and standards.

Communication 2/3

#	Questions	Answers
30.	**MDM Architecture and Single Source of Truth** 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.	▪ 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.	**MDM Architecture and Single Source of Truth** In the BRS, section 3.1, the approach required seems to suggest a logical, or virtual, MDM architecture, rather than a 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?	Yes, the existing master data records in the various operational systems are already consistent and linked via keys across.

#	Questions	Answers
32.	**MDM Architecture and Single Source of Truth** Are there requirements to identify and maintain relationships between master data records, and/or hierarchies, for example those pertaining to parties?	Refer to the BRS section 3.1 (a)
33.	**MDM Architecture and Single Source of Truth** 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?	SARS does have an integration pattern. The solution must be able to integrate to all listed sources / technologies in the BRS, section 3.13.
34.	**Data Domains and Scope** 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 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.	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.

#	Questions	Answers
35.	**Data Domains and Scope** 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?	The SARS's master data entities include both natural and legal entities and the relationship between both entities.
36.	**ADABAS, Mainframe, and Source Systems** 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?	Due to security reasons, the detail information regarding the mainframe operating environment will be shared at contracting phase. Connection to the mainframe ADABAS must connect natively and not through middleware.
37.	**ADABAS, Mainframe, and Source Systems** 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 integrated?	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.
38.	**ADABAS, Mainframe, and Source Systems** The BRS lists Microsoft Fabric as a required integration target.	Please refer to the BRS section 3.13 (g).

#	Questions	Answers
	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?	
39.	**ADABAS, Mainframe, and Source Systems** 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?	Please refer to the BRS section 3.13 (g).
40.	**ADABAS, Mainframe, and Source Systems** 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?	Due to the sensitivity and the nature of the technical specification, information will be provided at the contracting phase.
41.	**ADABAS, Mainframe, and Source Systems** Does SARS currently have an existing data catalogue, metadata 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?	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
42.	**Single Platform Requirement** 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?	The solution should be a single platform solution (without using multiple platforms) which cater for all aspects of Data Governance, Metadata and Data Quality.
43.	**Data Sovereignty and Hosting** 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?	▪ 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-

#	Questions	Answers
		controlled SaaS where SARS does not hold the tenancy will require explicit motivation and additional security/compliance demonstration. 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.
44.	**Subcontracting and Delivery Model** Will SARS allow for remote work for this engagement?	Details of the implementation will be shared at a contracting phase.
45.	**Data Quality** 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?	The impact will be determined by the data quality metrics as per the BRS section 3.7 (a).
46.	**Governance and Operating Model** 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?	SARS has an approved data governance framework, and it is expected that the supplier will adhere to it.
47.	**Governance and Operating Model** 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	The impact will be determined by the data quality metrics as per the BRS section 3.7 (a).

#	Questions	Answers
	already exist within the organisation, or whether their definition forms part of the implementation scope?	
48.	**Contract, SLAs, and Commercial Terms** 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?	Yes, the penalty structure will be detailed at the contracting phase.

Communication 1/4

#	Questions	Answers
1.	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?	▪ 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. 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.
2.	SARS Customs Management System (CMS) integration - what is the backing DB for this? (BRS 3.13(g))	▪ 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

#	Questions	Answers
		explicitly as an in-scope integration target. ▪ Bidders must therefore design CMS integration on the basis of a DB2-on-IBM-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. ▪ 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). 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.
3.	The Master entities (e.g. Taxpayer) are described as created in source systems. 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))	▪ 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

#	Questions	Answers
		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. 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.
4.	Are we expected to propose a separate data privacy and data security tool to meet the requirements?	▪ 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. 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.
5.	Is SARS looking for a single vendor solution? Is a solution that integrates solutions from different vendors to address all SARS requirements acceptable?	▪ 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.

#	Questions	Answers
		▪ Multi-vendor integrated stacks (for example, a separate data catalogue product from one vendor combined with an MDM hub from another, integrated through a third) are not aligned with the single-platform requirement of BRS Section 3.13 and will not be accepted. ▪ 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. 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.
6.	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?	No, SARS will only accept South African proven references
7.	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?	Refer to the BRS section 3.2 and 3.3 SARS does not have an existing automated and integrated metadata management tool.
8.	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	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)

#	Questions	Answers
	simulate the change & show expected outcomes? What level of impact visibility is required?	
9.	What's the expected data volume growth over 3 years? 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? ii. What are the approximate total data volumes (in TB/PB) across systems to be integrated, including both structured and unstructured data sources?	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.
10.	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?	Six levels of approval are needed. Policies are refreshed yearly.
11.	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?	A tiered SLA model is acceptable; however, the specific SLAs will be determined during the contracting phase.
12.	What is the average and peak daily data change volume (inserts, updates, deletes) across source systems?	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
13.	What is the estimated number of concurrent users expected to	It is required that all SARS employees (approximately 14 000) are granted read-only

#	Questions	Answers
	access data governance and master data services?	access, section 4.4 (c) of the BRS
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	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.

#	Questions	Answers
	applied across datasets?	
24.	What are the expected service level requirements in terms of system availability, response times, and throughput?	Refer to the BRS Section 4.2 and section 4.3 (a) 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.	Clarification is requested on the requirement to provide proof of solution ownership or authorised/accredited partner, distributor, or reseller status for the proposed platform. 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: ▪ 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?	▪ 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
	We note the requirement that subcontracting is not permitted and would appreciate clarity on how such arrangements should 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.**