

APPOINTMENT OF A PANEL OF SERVICE PROVIDERS FOR INFORMATION TECHNOLOGY SERVICES

RFP 14/2017

Briefing Session

13 November 2017, 11H00

Venue

2.2 Boardroom

Agenda

| TIME | SUBJECT | SPONSOR/PRESENTER |
|-------|----------------------|-------------------|
| 11:00 | Safety Evacuation | Tumo Makhopochane |
| 11:03 | Opening and Welcome | Tumo Makhopochane |
| 11:05 | Background and Scope | Romi Vidmar |
| 11:15 | Procurement | Tumo Makhopochane |
| 12:00 | Draft SLA | Lebogang Matlou |
| 12:20 | Questions | All |
| 12:30 | Closure | Tumo Makhopochane |

Safety Evacuation



Agenda

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| Questions | All |
| Closure | Tumo Makhopochane |

Opening & Welcome



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Background

- To enable SARS to establish a list of pre-approved service providers for provision of Information Technology services, as and when required;
- A Panel of service providers have been defined for this purpose;
- Successful bidders will remain on the panel for 6 years and SARS may choose to re-issue the tender at any point and appoint additional bidders to the panel;
- There is no guarantee to any panellist that SARS will issue work to them

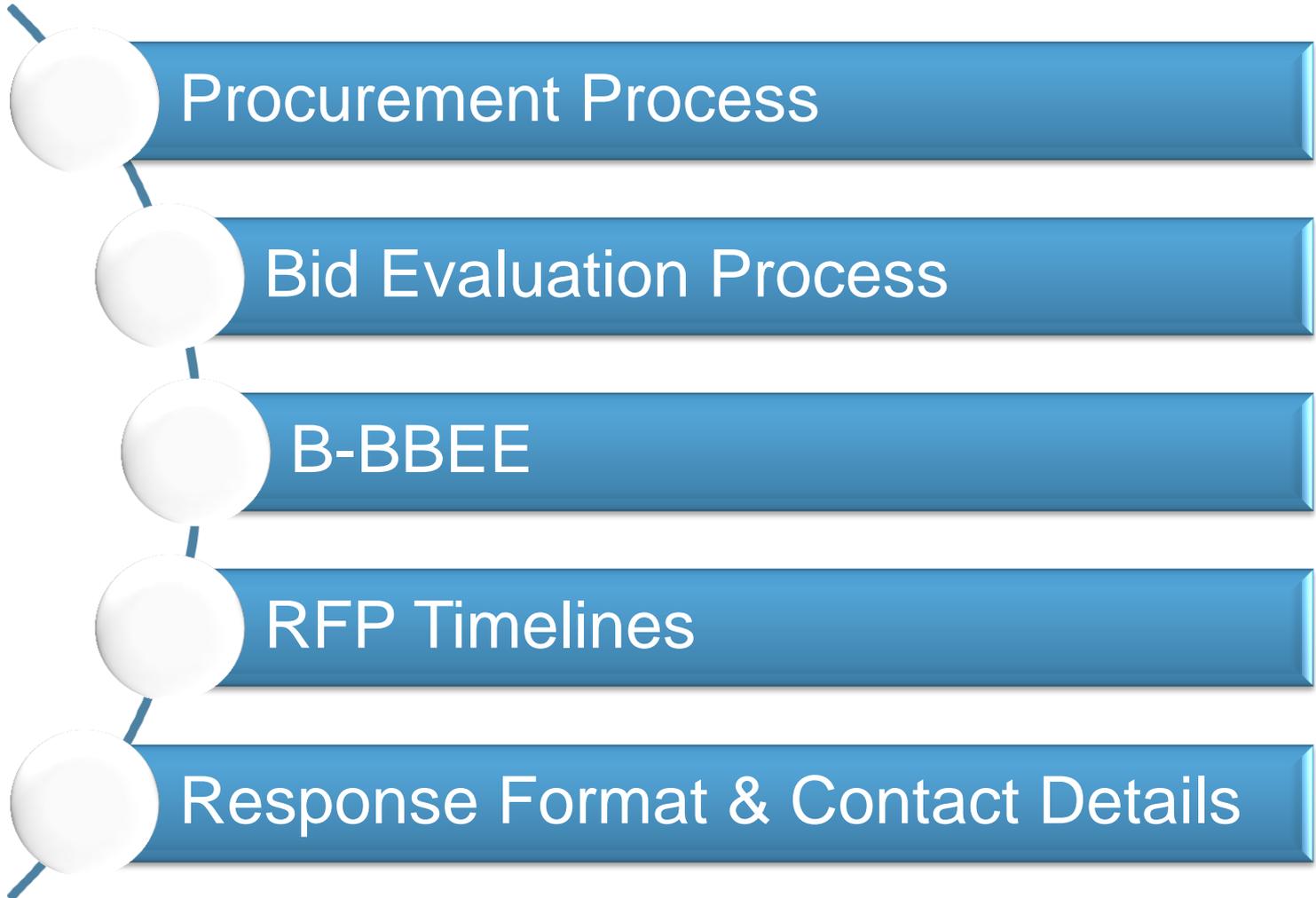
Scope

| IT Consulting Services | Managed Services |
|---|---|
| Category A - Architecture & Design | Support Services |
| Category B - Data Centre | Consultancy & Expert Advisory Services |
| Category C - IT Security & Risk Management | Turn-Key Solution |
| Category D - Systems & Solutions | |
| Category E - Other ICT Services/ Technical Support | |
| Category F - Server Management | |
| Category G - IT Strategy | |
| Category H - ICT Programs | |
| Category I - SAP Business Partner | |

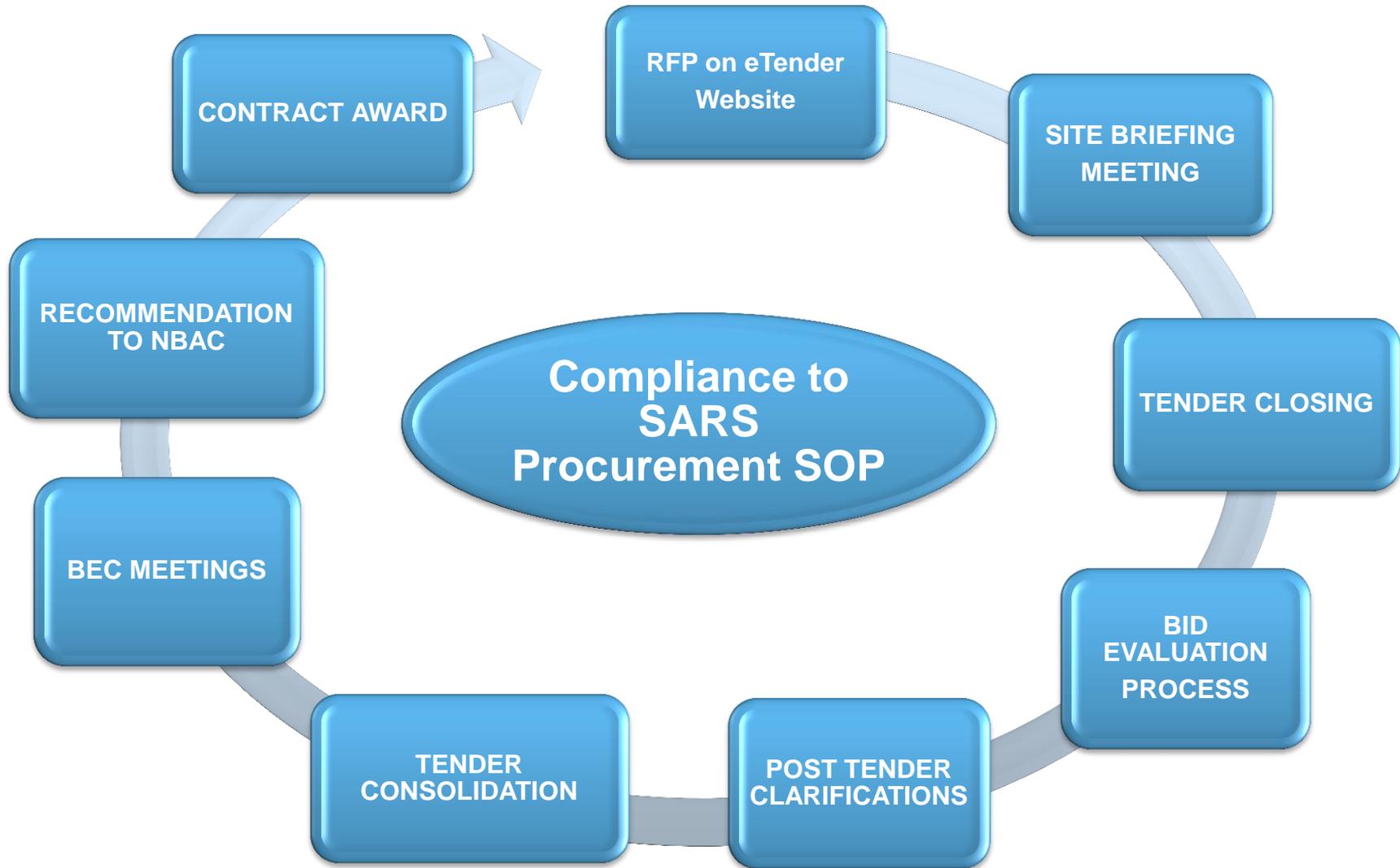
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Procurement Overview



Procurement Process



Bid Evaluation Committee

Procurement

Sourcing Lead: Professional Services – Project Oversight

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Pre-Qualification

B-BBEE Evaluator

SARS Business Unit

Bid Specification Committee

Technical Evaluators X 5

Corporate Legal Services

Legal Specialist

Bid Evaluation Process Refer to section 13 of the RFP

Gate 0

Pre-Qualification

- B-BBEE Level 3 or 30% Sub-contracting
- SAP Partner Certificate – only for Category I (SAP Business Partner)

- Invitation to Bid SBD 1
- Tax Compliance status pin
- Central Registration Report (Central Database System) from NT
- Pricing Schedule – Annexure D
- Declaration of interest SBD 4
- Preference Point Claim form- SBD 6.1
- Declaration of Bidder's Past SCM Practices – SBD 8
- Certificate of Independent Bid Determination – SBD 9
- SARS Oath of Secrecy
- General Conditions of Contract (GCC)
- Supplier cost and risk assessment questionnaire
- Three (3) most recent Financial Statements
- Bidders Compliance Checklist Form for Technical Evaluation (Annexure A2)

Gate 1

Achieve overall score of 75 out of 100 points to proceed to Gate 2

Technical Analysis

- Company profile
- Capability
- Skills Transfer
- Reference

Gate 2

B-BBEE = 20

Technical Requirements

Bidders are required to complete Annexure A2 to assist the evaluators to locate technical responses.

| Section No | Technical Criteria | Compliant | Partially Compliant | Non-Compliant | Reference page in Proposal | Comments |
|------------|--|-----------------------|---------------------|---------------|------------------------------|---|
| 9.3.1 | Company profile | Yes | | | Page 10 to 12 - exhibit 2 | |
| 9.3.2 | Methodology / technical approach <ul style="list-style-type: none"> • Course Outline • Customisation, Alignment and Implementation • Project Plan | Yes EXAMPLE | | | Page 13 to 17 - exhibit 2 | Bidder to state reason for partial compliance |
| 9.3.3 | Testimonial | | | No | Page 18 to 21 - exhibit 5 | Bidder to state reason for non-compliance |

Bid Evaluation Process Gate 2

The Price and B-BBEE points will be added together to determine each bidder's overall score out of 100 points.

Stage 1: Price Evaluation (80 points)

Bidders are required to complete all line items on the Pricing template (Annexure D) under these headings:

1. Junior Consultant or Equivalent
2. Consultant or Equivalent
3. Manager or Equivalent
4. Snr Consultant or Equivalent
5. Director or Equivalent
6. Partner or Equivalent



Microsoft Excel
Worksheet

Any changes to the template or an incomplete template may result in non-responsive bid.

B-BBEE = 20 Points

B-BBEE points may be allocated to Bidders on submission of documentation or evidence as follows:

| ADJUDICATION CRITERIA | POINTS |
|---|--------|
| A duly completed Preference Point Claim Form: SBD 6.1 and a B-BBEE Certificate. | 20 |

Bidders **MUST** complete and sign the SBD 6.1 form to claim the Bidder's B-BBEE preference points, failing which, the Bidder will be scored zero.

B-BBEE Certificate - Amended Codes

The table below indicates the specific B-BBEE certification documents that must be submitted for this tender. Failure to submit the required certification documents will also result in Bidders scoring zero for B-BBEE.

| Classification | Turnover | Submission Requirement |
|--|--|---|
| Exempted Micro Enterprise (EME) | Below R10 million p.a. | A sworn Affidavit or Certificate from CIPC |
| Qualifying Small Enterprise (QSE) | Between R10 million and R50 million p.a. | A sworn Affidavit or Certificate from CIPC Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA. |
| Large Enterprise (LE) | Above R50 million p.a. | Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by IRBA. |

SARS will accept B-BBEE Certificate issued on the revised B-BBEE Codes.

RFP Timelines

- **The RFP is available on eTender SARS' tender bulletin**
(<http://www.sars.gov.za/Procurement/Pages/Published-Tenders.aspx>)
- **Bidders are advised to visit SARS' website frequently for updated information**
- **Last date to submit clarifications: 24 November 2017**
 - ✓ Ensure clarification requests are clear and concise to enable SARS to provide a comprehensive response; and
 - ✓ Please indicate if the question posed is unique to your proposal (confidential)
- **The deadline for tender submission is 11:00 hours on 08 December 2017**
 - ✓ No late submissions will be accepted;
 - ✓ Tenders submitted to the email address or fax line will not be accepted; and
- **The place for delivery of the tender is the SARS Tender Box located at:**
Linton House - Ground Floor, Brooklyn Bridge, 570 Fehrsen Street, Brooklyn, Pretoria

Response Format

Arch Lever File1 to be submitted as follows – Original & Identical Copy:

Exhibit 1

- Submit proof of Central Supplier Database (CSD) Registration Report (preferably the CSD report in PDF format) from National Treasury
- Pre-qualification documents (SBD documents)
- General Conditions of Contract (GCC)

**Exhibit 2:
Technical
Response**

- Company Profile as per 10.5.1
- Skills Transfer as per 10.5.3

**Exhibit 3:
Technical
Response per
category**

- Capability as per 10.5.2
- Reference as per 10.5.4

Response Format

Arch Lever File2 to be submitted as follows – Original & Identical Copy:

Exhibit 1

- Valid Tax Clearance Certificate
- B-BBEE Certificate
- SBD 6.1

Exhibit 2

- Three (3) years audited/reviewed financial statements (a detailed explanation is required if statements are furnished for any lesser period)

Response Format & Contact Details

Bidders must submit copies of each file (Original and Duplicate) and a CD-ROM with content of each file by the **08 December 2017 at 11:00 hours**



TENDER BOX

SARS Brooklyn Bridge, 570 Fehrsen Street, Linton House, Brooklyn

Any enquiries must be referred, in writing via email to:
tenderoffice@sars.gov.za and cc rft-professionalservices@sars.gov.za

Service Level Agreement

Service Providers are requested to:

- Comment on the terms and conditions set out in the services agreement and where necessary, make proposals to the terms and conditions;
- Each comment and/or amendment must be explained; and
- All changes and/or amendments to the services agreement must be in an easily identifiable colour font and tracked for ease of reference.
- SARS reserves the right to accept or reject any or all amendments or additions proposed by a service provider if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

