

- **APPOINTMENT OF CONSULTANTS FOR SAP GRAP MIGRATION AND RELATED PROJECTS**

Briefing Session : 18 January 2017, 11H00

RFP No : RFP 38/2016

Closing Date : 26 January 2017, 11H00

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# Bid Evaluation Committee

## Procurement

Commodity Leader: Professional Services – Project Oversight

Governance, Compliance & Risk Specialist – Audit

Contract Specialist

Tender Office – Pre-Qualification

Value Delivery Planning – Price Evaluator

B-BBEE Evaluator

## SARS Business Unit

Bid specification team

Technical Evaluators X 3

## Corporate Legal Services

Legal Specialist

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# RFP Timelines

ACTIVITY	DUE DATE
RFP Advertisement in Government Tender Bulletin and National Treasury Tender Portal.	13 January 2017
RFP Advertisement in Sunday Times paper	15 January 2017
Tender Documents on SARS Website	16 January 2017
<b>Non-Compulsory Briefing Session</b>	<b>18 January 2017, 11H00</b>
Questions Relating to RFP	16 - 23 January 2017
RFP Closing Date	26 January 2017 : 11h00
Bidder Presentations	17 – 22 February 2017
Notice to Bidders	* March/ April 2017

\* Dates subject to change.

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# Background and Scope of work

## Background

- SAP is strategically positioned as the accounting platform and backbone of SARS to “house” all taxpayer/trader accounts, and therefore is a key contributor and resource to ensuring that SARS meets its Generally Recognised Accounting Practice (GRAP) compliance.
- The successful bidder(s) will be required to provide SARS with one or any number/combination of the following consultants/resources:
  - SAP Solution Lead (K5)
  - 2x SAP TRM Functional Consultant (K4 and K5)
  - SAP BRFPlus Consultant (K5)
  - 2x SAP PSCD Functional Consultant (K4 and K5)
  - SAP FICO Functional Consultant (K5)
  - SAP Basis (HANA) Consultant (K5)
  - SAP Solution Architect (K5)
  - SAP PO Consultant (K5)
- Refer to section 9.3 of the RFP document on the duties of each consultant

# Background and Scope of work

## Scope of Work

- Section 9.3 of the RFP document detail the duties of each consultant.
- Bidders must only recommend one (1) consultant per functional role that they are bidding for.
- Bidders may respond to one (1) or any number of the categories/functional role that they have demonstrated expertise in rendering the services.



# Background and Scope of work

## Duration of Contract

No	Resource	Initial Term of Contract							Option to Extend				Maximum Duration of Contract
		Start-time											
		1	2	3	4	5	6	7	8	9	10	11	
1	SAP Solution Lead (K5)												11 months
2	SAP TRM Functional Consultant (K4 and K5)												11 months
3	SAP BRFPPlus Consultant (K5)												11 months
4	SAP PSCD Functional Consultant (K4 and K5)												11 months
5	SAP FICO Functional Consultant (K5)												7 months
6	SAP Basis (HANA) Consultant (K5)												11 months
7	SAP Solution Architect (K5)												5 months
8	SAP PO Consultant (K5)												4 months

### NOTES:

- The option to extend does not apply to SAP PO Consultant, SAP Solution Architect and SAP FICO Function
- SARS reserves the right to extend the contract where applicable, on a month to month after the initial term of contract or by any number of months not exceeding 4 months.

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# Bid Evaluation Process Gate 0: Pre-Qualification Criteria

Gate 0

Pre-Qualification

The following documents must be submitted for pre-qualification Gate 0:

Name of Document that must be submitted	Non-submission may result in disqualification?
Invitation to bid – SBD 1	YES
Central Registration Report (Central Database System) from National Treasury	YES
Tax Clearance certificate (Independent contractors/Sole Proprietor must obtain their individual Tax Clearance certificate)	YES
Declaration of Interest – SBD 4	YES
Preference Point Claim Form - SBD 6.1 and B-BBEE certificate	NO
Certified Copies of Identity Document or Passport	YES
SARS' Oath of Secrecy	YES
Pricing Schedule	YES
General Conditions of Contract (GCC)	YES
<b>Non-submission will result in disqualification</b>	
SAP Partnership Certification	YES

# Bid Evaluation Process Gate 1 – Technical Evaluation

Only bidder(s) that have met the Pre-Qualification Criteria in (Gate 0) will be evaluated in Gate 1 for functionality.

Criteria	Maximum Points Allocation
<b>DESKTOP/ SHORTLISTING</b> <ul style="list-style-type: none"><li>• Each consultants will be score on their qualification and experience provided on the Resume template (Annexure C) as stipulated on section 14 of the RFP document</li><li>• <i>The information is the minimum requirements for each functional role. The bidder must provide detailed information which demonstrates that they meet the minimum requirements</i></li></ul>	50
<b>PRESENTATION</b> <ul style="list-style-type: none"><li>• The recommended consultant will be requested to be present at the presentation.</li><li>• A video conference will be used for shortlisted resources who do not reside in South Africa.</li><li>• The evaluation criteria for Presentations will be sent out to the shortlisted bidder(s).</li></ul>	50
<b>TOTAL</b>	100

# Bid Evaluation Process Gate 1 – Technical Evaluation (cont)

The Bidder(s) information will be scored according to the following points system:

## **DESKTOP/ SHORTLISTING ( 50 points)**

Bidders will be evaluated out of 50 points based on the information provided and any supplementary information specific to the functional role they are bidding for.

Bidders must obtain a minimum threshold of **35 points** out of 50 to be shortlisted and invited for presentation.

## **PRESENTATION ( 50 points)**

The shortlisted bidders will be evaluated out of 50 points on presentation.

The evaluation criteria for Presentations will be sent out to the shortlisted bidder(s).

## **COMBINED SCORE**

The bidder must obtain a minimum combined score of 70 points for desktop and presentations to proceed to Price and BBBEE evaluation.

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# Bid Evaluation Process Gate 2 – Price and BEE

- 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 (90 points)

Adjudication Criteria	Points
Price Evaluation $P_s = 90 \left( 1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	90

$P_s$  = Points scored for price of Bid under consideration  
 $P_t$  = Rand value of Bid under consideration  
 $P_{\min}$  = Rand value of lowest acceptable Bid

# Bid Evaluation Process Gate 2 – Price and BEE (cont.)

## Stage 2: B-BBEE Evaluation (10 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: Standard Bidding Document (SBD 6.1) and a B-BBEE certificate.	10

Bidder(s) who do not claim Preference Points will be scored **0** for B-BBEE, but will not be excluded from the tender process. Bidders, who do not fill SBD 6.1 in its entirety, will not be awarded points for B-BBEE.



# B-BBEE key Sections to complete in SBD6.1

## 5. BID DECLARATION

5.1 Bidders who claim points in respect of B-BBEE Status Level of Contribution must complete the following:

## 6. B-BBEE STATUS LEVEL OF CONTRIBUTION CLAIMED IN TERMS OF PARAGRAPHS 1.4 AND 5.1

6.1 B-BBEE Status Level of Contribution:.....= .....(maximum of 10 or 20 points)

(Points claimed in respect of paragraph 7.1 must be in accordance with the table reflected in paragraph 5.1 and must be substantiated by means of a B-BBEE certificate issued by a Verification Agency accredited by SANAS or a Registered Auditor approved by IRBA or a sworn affidavit.

## 7. SUB-CONTRACTING

7.1 Will any portion of the contract be sub-contracted?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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7.1.1 If yes, indicate:

i) What percentage of the contract will be subcontracted.....%

ii)The name of the sub-contractor.....

iii) The B-BBEE status level of the sub-contractor.....

iv)Whether the sub-contractor is an EME.

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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# Sub-Contracting

## Sub-contracting

Bidders who want to claim preference points will have to comply fully with regulations 11(8) and 11(9) of the Preferential Procurement Regulations, 2011 with regard to sub-contracting:

### **Regulation 11(8)**

- A person must not be awarded points for B-BBEE status level if it is indicated in the tender documents that such a tenderer intends sub-contracting more than 25% of the value of the contract to any other enterprise that does not qualify for at least the points that such a tenderer qualifies for, unless the intended sub-contractor is an Exempted Micro Enterprise that has the capability and ability to execute the sub-contract.

### **Regulation 11(9)**

- A person awarded a contract may not sub-contract more than 25% of the value of the contract to any other enterprise that does not have an equal or higher B-BBEE status level than the person concerned, unless the contract is sub-contracted to an Exempted Micro Enterprise that has the capability and ability to execute the sub-contract.

# B-BBEE Certificate

The table below indicates the B-BBEE documents that must be submitted for this bid. Failure to submit the required documents will result in bidder(s) scoring zero (0) for B-BBEE.

No.	Classification	Turnover	Submission Requirement
1.	Exempted Micro Enterprise (EME)	Below R10 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by the Independent Regulatory Board for Auditors (“IRBA”) or a letter from an Accounting Officer as contemplated in the CCA.
2.	Qualifying Small Enterprise (QSE)	Between R10 million and R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency or a Registered Auditor approved by the IRBA.
3.	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 the IRBA.

**NB: SARS will accept B-BBEE Certificates issued under the revised B-BBEE Codes.**

# Use and Acceptance of affidavits

- It has been advised that the Verification Professional will need to test the affidavits submitted as part of a company's procurement rating. All companies will need to request the information which proves Black Ownership and Turnover in addition to the affidavit, or request that their EME/QSE supplier be verified and have this confirmed.
- SARS reserves the right to request that bidders submit proof of their black ownership and turnover information, in support of their sworn affidavits.

# Joint Ventures (JVs) and Consortiums

- Incorporated JVs must submit the B-BBEE status of the entity. Unincorporated JVs must submit a consolidated B-BBEE scorecard as if they were a group structure for every separate bid.
- Bidders must submit concrete proof of the existence of joint ventures and/or sub-contracting arrangements. SARS will accept signed agreements as acceptable proof of the existence of a joint venture and/or sub-contracting arrangement.
- The joint venture and/or sub-contracting agreements must clearly set out the roles and responsibilities of the lead partner and the joint venture and/or sub-contracting party. The agreement must also clearly identify the lead partner, who shall be given the power of attorney to bind the other party / parties in respect of matters pertaining to the joint venture and/or sub-contracting arrangement.

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# Bid Submission

Bidders must submit copies of each file (Original and Duplicate) and a USB with content of each file by the **26 January 2017 at 11:00**



## 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](mailto:tenderoffice@sars.gov.za) and cc [rft-professionalservices@sars.gov.za](mailto:rft-professionalservices@sars.gov.za)

# File 1: Original/ Duplicate

Exhibit 1

- Pre-qualification Documents (SBD documents)



Exhibit 2

- Bidder's profile
- Academic qualifications
- Professional Certificates/Certified membership
- References



Exhibit 3 A –  
3H

- Resume Templates



Exhibit 4

- General Conditions of Contract (GCC)
- Draft Services Agreement





## File 2: Original/ Duplicate

Exhibit 1

- B-BBEE Certificate



Exhibit 2

- Rate Card for each resource bidding



### Note:

- SARS request that bidders use Lever Arch files to package their proposals.
- Each file must be marked correctly and sealed separately for easy reference during the evaluation process. USB marked with Bidder Name.

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