SARS RFP 65/2018

ICT Facilities Services

Business Requirements Specification

Contents

1. **Introduction**

   The purpose of this document is to describe the business requirements for RFP 65/2018 to outsource the maintenance, break-fix, upgrades and enhancement of the ICT Facilities Infrastructure in the ICT Facilities at SARS Sites (hereinafter referred to in this document as 'sites') countrywide. If awarded, these services will be delivered by the successful bidder/s according to the specifications set out below as well as in accordance with the conditions in the associated ICT Facilities Services Agreement.

   The objective of the ICT Facilities Services Agreement is to ensure the optimum availability of ICT services to SARS, by maintaining an adequate and stable environment with effective and reliable air-conditioning, standby power, electrical power, fire protection, environmental monitoring, and a secure, safe, clean and compliant facility.

   To achieve this, the appointed Service Provider will ensure that the ICT Facilities Infrastructure is properly and regularly inspected, maintained, serviced, tested and that repairs and equipment upgrades are promptly and effectively carried out in accordance with the ICT Facilities Services Agreement.

2. **Service Definitions**

   The SARS ICT Facilities department currently uses a combination of internal resources and approved external service providers to provide the services defined in this document and to deliver the required quality assurance. The purpose of aggregating and consolidating the services into an outsource model is to eliminate the gaps in responsibilities, provide continuity of services and to provide for single accountability to improve the service delivery. For clarity, neither internal SARS staff nor the staff of incumbent service provider's staff will be transitioned to the successful Bidder as a result of the award of the RFP 65/2018.

   The scope of the intended ICT Facilities Services Agreement will cover ICT Facilities at approximately 129 sites nationwide. The lists of ICT Facilities Infrastructure category contained (see paragraph 45) represents the lists of equipment intended to be included in scope at the commencement date of the contract and this will be subject to the reconciliation performed during Transition (see paragraph 6).

The ICT Facilities in most cases are controlled by SARS, with the exception of the ports of entry, where the ICT Facilities are jointly controlled by all the government stakeholders operating at that port or their assignees. Despite this, the point of contact in all cases for ICT Facilities related services will be the SARS ICT Facilities department and they remain in scope.

2.1. **The Bidder's attention is drawn to the provisions regarding non-exclusivity of the award of the RFP 65/2018. In addition, during the Term SARS may contract with other service providers to perform certain of the scope of the Services. The Bidder's attention is drawn to the provisions of the ICT Facilities Services Agreement regarding the notice periods involved should SARS elect to engage other service providers or to provide the services itself.**

2.2.

2.3.

2.4.2.2.   **Elements of the required Services**

These services must be delivered to the ICT Facilities Infrastructure in all sites listed Annexure B: ICT Facilities Site List & Equipment Quantities per Category.

Maintenance

Carrying out of routine preventative maintenance activities according to checklists as determined by best practice, manufacturer's specifications and by SARS to proactively ensure the continued and optimal functioning of equipment.

Break-Fix

The repair of in-scope ICT Facilities infrastructure must be performed in accordance with the agreed service levels set out in this document in accordance with the classification of the sites.

ICT Facilities Infrastructure upgrades/replacements

Modifications and upgrades to ICT Facilities and ICT Facilities Infrastructure may be required from time to time to meet the changing needs of SARS.

Projects

This involves the management and co-ordination of complex activities relating to the enhancements of the ICT Facilities Infrastructure. This may involve the management of third party vendors.

2.5.2.3. Sites Definition

The Services are required to be delivered at sites in all nine provinces within the Republic of South Africa, with the highest concentration of sites being in the Gauteng province. A Bidder must submit a proposal for all Services at all sites nationally. Refer to Annexure B: ICT Facilities Site List & Equipment Quantities per Category for details of sites within each site.

2.6.2.4. Types of sites

All SARS offices, depending on the business functions performed at those offices, range from: -

- Head Office
- Office Campus
- Contact Centre
- Administration Office
- Revenue Office
- Customs Office and Dog Units
- Port of Entry (International Airports, Harbours, Land Borders) to
- And SARS Mobile Tax Units (MTUs) and
- State Warehouse

2.7.2.5. Site Classification for purposes of services required
Essential / Enhanced

Depending on the maintenance requirements, all SARS Sites are classified as being either requiring Essential or Enhanced Maintenance type. A site classification as being requiring Enhanced Maintenance site will a higher frequency of maintenance then a site classification of a Essential type.

The table below illustrates the high level difference between activities required at Essential versus Enhanced sites. Bidders must refer to Appendices C through L for the detailed activities required per category of ICT Facilities Infrastructure for each of Essential and Enhanced sites.

	Essential	Enhanced
Monthly maintenance	x	Selected ICT Facilities Infrastructure
Quarterly Maintenance	All ICT Facilities Infrastructure	All ICT Facilities Infrastructure
Annual maintenance	Same as quarterly maintenance and additional activities for selected ICT Facilities Infrastructure	Same as quarterly maintenance and additional activities for selected ICT Facilities Infrastructure

Maintenance activities fall within an overlapping period of another maintenance, the Checklist which include the most comprehensive activities will be performed. So for example the activities dictated by the quarterly, and monthly Checklists will be subsumed as part of the annual maintenance Checklist.

Annual maintenance will replace the quarterly maintenance, monthly maintenance, that fall due at the same time. The same principle applies to the quarterly maintenance and monthly maintenance.

After Hours / During Business Hours

Depending on the nature of the business conducted at a site, it may not be possible to carry out maintenance activities during office hours (7:00 – 17:00 Weekdays). Hence certain sites have been classified as 'After Hours' sites which demand that maintenance activities may only be conducted outside normal office hours at such sites. Bidders

should take note of this requirement as it will impact the scheduling and costs of resources to perform maintenance at such sites.

Sites classified as 'During Hours' sites do not permit maintenance outside of office hours. Bidders should likewise take note of the impact of such requirements on the scheduling of resources.

Bidders should note that this classification does not affect the times during which break-fix activities may occur. Break-fix activities are governed by the Service Coverage Period. (See section 2.7)

2.8.2.6.   Site Classification for purposes of travel

Certain cities/towns are designated as Regional Main Centres.

The bidder and/or its subcontractor must have footprint in ALL main centres or 150 km within the main centres delivers ICT Facilities Services related to electrical reticulation, standby power, generators, Uninterruptable Power Supply (UPS) and air-conditioning as well as fire system protection. The Bidder, together with its subcontractors, must have a presence in every Regional Main Centre.

Regional Main Centres

No	Centres Name	Physical Address	Town/City
1	Customs & Revenue - Bloemfontein Central Gov	32 Church Street, Maluti Square	Bloemfontein
2	Revenue - Bellville Sable House	Somerset Link Office Park	Cape Town
3	Revenue - Trescon House	201 Dr Pixley Kaseme Street	Durban
4	Customs & Revenue - East London - Waverly Building	East 5247 5 Philip Frame Road, Chiselhurst, East London	East London
5	Revenue - Kimberley - Bean and Crossman	31 Dunell St, Kimberley, 8300	Kimberly
6	Revenue - Klerksdorp	21 Anderson St, Klerksdorp Central, Klerksdorp, 2570	Klerksdorp
7	Revenue - Nelspruit	31 Sitrus Cres Nelspruit 1201	Nelspruit
8	Revenue - Polokwane	Landros Maree Street, Polokwane Central, Polokwane, 0700	Polokwane
9	Admin - Lehae la SARS	271 Veale Street Nieuw Muckleneuk Pretoria 0181	Pretoria
10	Revenue - St Mary's Terrace (Port Elizabeth)	Chapel St Port Elizabeth Central, Port Elizabeth 6006	Port Elizabeth

The classification of a town/city as a Regional Main Centre may change in response to changing Service Levels or business requirements.

A SARS Supported Site located in the Regional Main Centre, or - if there is no SARS Supported Site in the Regional Main Centre - the town/city centre will be used as the point from which the distances to other SARS Supported Sites which have such town/city designated as their Regional Main Centre will be measured. Service Providers will not be allowed to charge for travel to SARS Supported Sites less than 50km away from the Regional Main Centre.

Bidders must provide the price for travel to sites on the basis of the distance from the Regional Main Centres in the [pricing tables]. The price quoted in the Bidder's Proposal is on a per visit basis and must include the technician's time during travelling. Refer to Annexure D: Pricing Template for further details and instructions in this regard.

2.9.2.7. Site Classification for purposes of service levels

For the purposes of contractual service level management, sites are classified according to the service level that must be applied to ICT Facilities Infrastructure within that site for break-fix incidents.

There are two dimensions that govern service levels: Service Coverage Period and Service Level (Metal):

Service Coverage Period

This describes the hours during which the service provider will be expected to provide break-fix services.

In brief the levels demanded within the categories are

Service Coverage Period:

Coverage	Operating times	
Standard	07:00 to17:00	Weekdays, excl public holidays
Extended	07:00 to 22:00pm	Weekdays, excl public holidays
	07:00 to 13:00	Saturdays
Premium	24 hours	Every day

Service Level (Metal)

The Service Level (metal) applicable to a site specifies the time within which a service provider must respond to and repair incidents related to ICT Facilities Infrastructure at that site.

For details of the contractual obligations relating to Service Coverage Periods and Service Levels the Bidder is directed to the ICT Facilities Agreement as it appears below:

Metal	Response	Repair
Gold	Less than 1 hour	Less than 2 hours
Silver	Less than 2 hours	Less than 4 hours
Bronze	Less than 4 hours	Less than 8 hours

(Times above are measured from the time of reporting the incident to the service provider)

Note*: -* During peak "Filing Season" times or other important periods determined by business cycles, SARS may change the Service Level and/or Service Coverage Period. The Bidder should take note of the conditions and notice periods that SARS is required to give the Service Provider in order to exercise this right.

If a change is required to rectify a break-fix incident then Service Provider must adhere to SARS change management procedures. Depending on the associated risk and impact of such activities SARS change management may force such activities to fall outside the designated Service Coverage Period. If so, then the service levels do not apply to the extent that SARS change management has delayed the repair time.

Where SARS requests Service Provider to perform break-fix activities to a higher Service Level or outside the Service Coverage Period times, the repair time will be agreed between the parties and the additional costs, if any, that may apply.   If

additional costs are charged, they will not be charged in excess of the hourly personnel rates as contained in the Service Provider's proposal.

2.10.2.8.   Exclusions

SARS has existing maintenance contracts for certain specialized ICT Facilities Infrastructure at certain sites, which will be excluded from this contract for all or part of the Term. An example of such exclusion is air-conditioning at land border posts.

This RFP is only for the maintenance and repair of the ICT Facilities Infrastructure in the SARS ICT Facilities, and DOES NOT include facilities and environmental equipment in other parts of SARS buildings and general office areas. These are managed by the SARS Corporal Real Estate (CRE) department, and are excluded from this contract at Commencement Date. Nothing precludes such equipment or such buildings / office areas from being included in the scope at a future date during the Term. However where it is necessary, in order for Service Provider to fulfil its obligations under the ICT Facilities Services Agreement, is required to work with other departments and third party providers, the Service Provider will do so and should take account of such activities in its Proposal price accordingly.

ICT Facilities - Room classification

SARS ICT Facilities rooms are constructed to meet the needs of each site, according to a defined standard as follows:

Room Classification	Room Size	No of Cabinets
Network Patch Room	< 12 m^2	2 cabinets
Small Server Room	12-19 m^2	2 cabinets
Medium Server Room	20 - 25 m^2	5 – 8 cabinets
Large Server Room	> 25 m^2	> 8 cabinets
Specialised Server Room	Dependent on requirements e.g. Call Centre	Dependent on requirements e.g. Call Centre

Plant Room	Dependent on requirements	Dependent on requirements

Minimum standards applying to the room classifications

Network Patch Rooms

- Ventilation fan or air-conditioner, depending on installed equipment.
- Antistatic floor, locked door, and dedicated power feed
- Two 5 kg Fire Extinguishers

Server Rooms (all sizes)

- Passive fire protection systems which includes fire rated walls and doors-Active fire protection systems which include fire suppression systems (water and/or gas) and fire detection systems with controller and alarm
- Hand operated fire extinguishers – both outside and inside the ICT Facility
- Dedicated electrical power feed and power distribution board
- Electrical reticulation to equipment cabinets and all supporting equipment in the room
- Lighting, including emergency lighting with battery back-up
- Air-conditioning with at least n+1 redundancy
- UPS systems with at least N+1 redundancy in large server rooms
- Antistatic flooring with raised access floors
- Environmental monitoring (temperature, humidity, water leak detection)
- Electronic access control

Plant Rooms

- Ventilation fan or air-conditioner, depending on the equipment housed in the facility
- Antistatic floor, locked door, and relevant power feeds / Distribution boards etc
- Safety equipment and signage as per code.

2.11.2.9.   Categories of ICT Facilities Infrastructure

ICT Facilities Infrastructure, which is located in the SARS ICT Facilities and the Mobile Tax Units, includes, but is not limited to, the following categories:

IT Facilities Infrastructure Category	Description
• Air-conditioning equipment	• All required infrastructure for purposes of providing cooling for the ICT infrastructure. • Air-conditioning infrastructure ranges from industrial air-conditioning infrastructure such as chiller plants to domestic air-conditioning infrastructure such as wall and ceiling mounted split units. • The most commonly used air-conditioner systems are wall or ceiling mounted split units, window units, hide-away units, down-blow units, chillers and chilled water reticulation.
• Uninterrupted Power Supply (UPS) equipment	• All UPS devices ranging from small rack mounted units to large industrial devices which supply power via a dedicated distribution board. • Standby and line interactive UPS devices.
• Electrical Power Reticulation	• Electrical reticulation infrastructure consists of 2 categories: Low tension (LT) and High tension (HT) described below: Included in the general scope of Electrical reticulation is the inspection and reporting of electrical lighting equipment and non-conformance of end

	devices and adaptors. Bidder is referred to Appendix O and P of this document.
	Low Tension
	• Electrical Distribution in the ICT rooms covers all connections between the distribution board ("DB") in the ICT room to the Power Distribution Unit ("PDU") in the cabinets and other power outlets within the room.
	• Voltage used ranges from 220V to 999 V
	• Associated infrastructure like cable trays and ducting is also included in the scope.
	High Tension
	• Only refers to the SARS Head Office (Le Hae la SARS)
	• Refers to all electrical devices starting with HT Transformer into a building and ending with the main electrical distribution board that supplies power to all other DB's
	• Voltage used exceeds 1000V
• Electrical Emergency Generators –	• Electrical Generators refers to the electrical backup generators serving the ICT Facilities and possibly SARS office buildings.
	• The scope excludes the provision of fuel.

• Fire prevention systems and fire protection systems.	• Fire protection systems include fire suppression systems (gas or water-based), fire extinguishers and fire detection systems like fire or smoke detectors. • All such systems have control units with integrated alarms, which may be integrated into the building management system • All related signage as per the applicable codes are included in the scope
• Access Control Systems	• Access control systems include biometric and conventional card / tag systems. • The responsibility for such systems may be transferred to a SARS internal department during the Term.
• Safety, Security and Environmental Monitoring Equipment	• Safety, Security and Environmental Monitoring Equipment (e.g. Netbotz systems) including sensors that monitor: temperature; humidity; water leaks; access to the facility; power to the UPS etc. • Support of SNMP (Simple Network Management Protocol) capability for SNMP enabled equipment.
• General Physical Infrastructure.	• This category includes all infrastructure related to the ICT Facility itself, including (raised flooring, wall brackets, cable and cooling ducting etc).

Refer to Appendix A for a schematic representation of the equipment in scope for this RFP and the relationships between them.

2.12.2.10.   Updates and Amendments

SARS reserves the right to change, add, or remove items of equipment or sites from the list, as dictated by growth or changes to the infrastructure. The pricing templates contain rates for each category of equipment and all combinations of service level, service coverage periods etc. and hence allow the Bidder to price for such flexibility.

3. **Architecture**

3.1. High Level Technical Architecture

- All SARS Offices are connected through a country-wide network (WAN), linked to the SARS Pretoria Head Office at Le Hae la SARS.

- Users at Branch Office level (Access sites) connect via a LAN at the Access site, which in turn connects to a regional Town Concentrator (TC) Site. The Town Concentrator sites connect to the SARS Pretoria Head Office thereby providing connectivity for all SARS users to the central systems.

- Each site has at least one ICT Facility, the size and complexity being dependent on the equipment located at that site.

- Within any office there are usually one or more Network Patch Rooms or wall cabinets for the Network connections (switches), which control the connection between the users and the Server Room.

4. **ICT Facilities Infrastructure deployed**

The ICT Facilities Infrastructure deployed is described below. The Bidder is directed to look into Annexure B specific list for ICT Facilities Site List & Equipment Quantities per Category' for the designated Regional Main Centre for each SARS Supported Site for the details of equipment actually present in the sites

4.1. Air-conditioning

For ICT Facilities the following types of air-conditioning are used: -
- Wall or Ceiling mounted split units
- Window Units
- Hideaway units
- Down-blow units
- Chillers and chilled water reticulation systems
- Environment monitoring equipment

SARS has a variety of air-conditioner brands, including those listed below:

- Airblue (Chilled water reticulation system)
- Airedale
- Carrier
- Daiken
- Defy
- Dunham-Bush
- LG
- Samsung
- McQuay
- Mitsubishi
- Panasonic
- Train (Chilled water reticulation)
- UniFlair
- York
- Jet air
- Nashua
- Blue Box
- Alliance Air
- TCL

4.2. UPS

For ICT Facilities, the following types are used: -

- Single- & Three-Phase UPS's
- Rack-mount UPS's
- Standalone UPS's
- Line interactive UPS
- Standby UPS
- In most cases external battery units are used

SARS has the following brands of UPS's:

- APC
- HP/Compaq
- Titan
- Tower
- Meissner
- MATLA
- MGE
- Liebert
- General Electric

4.3. Electrical Reticulation

Some or all of the following would be present in ICT Facilities:

- Distribution board(s) for all power, UPS connections etc.

- All electrical reticulation including end point equipment such as lighting, plugs and power feeds to the computer equipment.

- Power connections to the air-conditioning equipment.

- Power connection for the UPS points in all the IT Equipment's in each site

4.4. Generator

SARS has the following generator brands

- Perkins
- Detroit
- Kirloskar
- Diesel-Electric
- Volvo
- Doosan
- John Deere
- Scania
- Cummins
- Iveco

4.5. Fire

For ICT Facilities SARS has the following

- Fire system control units & alarms
- Automatic fire suppression systems (gas and/or water-based)
- Gas systems in use include Argon and Inergen
- Hand operated CO_2 fire extinguishers
- Ceiling and under-floor smoke detectors
- Rescue breathing apparatus
- Relevant signage

4.6. Access control systems

SARS ICT Facilities do have standalone Sagem MorphoAccess / MorphoSoft bio-metric and card / tag access control systems. However the preference is to use to the building access control which is out of scope.

4.7. Safety, Security and Monitoring Equipment

SARS ICT Facilities currently have Netbotz equipment installed.

All the ICT Infrastructure (e.g. UPS) are enabled with the SNMP for central monitoring

List of devices that are monitored by Safety, Security and Monitoring Equipment:

	Current Devices Monitored	Future Devices Monitored
Mains Power Failure	No	Yes
Generator Running	No	Yes
Generator Voltage OK (ICT Generators)	No	Yes
Generator Fault	Yes	Yes
UPS Voltage OK	Yes	Yes
UPS Fault	Yes	Yes
UPS Battery Low	Yes	Yes
Room Temp	Yes	Yes
Air-Conditioners	Yes	Yes

(Temperature)		
Air-conditioners (Other)	No	Yes
Server Room Door	Yes	Yes
Water in Server Room	Yes	Yes
Fire Panel	Yes	Yes

In the future more devices may be added as the capability for being monitored becomes available.

4.8. New Equipment

Modifications and upgrades to ICT Facilities and ICT Facilities Infrastructure may be required from time to time to meet the changing needs of SARS and latest technology. This may, at SARS' discretion, include the supply of new or additional equipment and ICT Facilities and ICT Facilities Infrastructure. The supply of new equipment would be made on a Pass-Through Basis although the Service Provider would be able to charge for delivery, installation and commissioning.

5. **Service Requirements**

5.1. Inspection

Inspection activities are undertaken on a routine basis at set time intervals between maintenance activities. Inspection on the general condition of ICT Facilities Infrastructure as well as specific checks must be made.

If anything is discovered during routine inspection visits that warrant maintenance it must be reported to SARS and, if authorized by SARS, must be maintained. Such maintenance activities performed will be included in the price for the inspection.

If anything is discovered during routine inspection visits that warrants break-fix activities it must be reported to SARS and, if authorized by SARS, must be repaired and may be charged for at the Break-fix rate.

5.2. Maintenance

The principal and prime requirement of the routine maintenance is to ensure optimum reliability of the ICT Facilities Infrastructure and to minimise outages and impact to business.

If, during a maintenance session, it is found that repairs are needed to the ICT Facilities Infrastructure, it must be reported to SARS and, if authorized by SARS, must be repaired and may be charged for at the Break-fix rate.

Routine maintenance must be carried out according to the manufacturer's specifications or, if different to manufacturer's specification, one agreed with SARS.

A documented plan and schedule of maintenance activities must be agreed, and confirmed by the submission of signed service reports as and when the work at each site has been completed.

Invoices submitted for maintenance work must be accompanied by signed service reports before payment will be effected.

The following Appendices contain the minimum activities required for maintenance

- Minimum Maintenance Requirements (Air-conditioning) – See *Appendix C*
- Minimum Maintenance Requirements (UPS) – See *Appendix D*
- Minimum Maintenance Requirements (Electrical Reticulation) – See *Appendix L, K and E*
- Minimum Maintenance Requirements (Generators) – See *Appendix F*
- Minimum Maintenance Requirements (Fire Prevention and Control) – See *Appendix G*
- Minimum Maintenance Requirements (Access Control) – See *Appendix H*
- Minimum Maintenance Requirements (Environmental Monitoring) – See *Appendix L*

The Bidder must prepare pricing for scheduled maintenance based on the checklist of activities in Appendices C to L.

5.3. Break-Fix

Break-fix activities are the activities required in order to restore ICT Facilities Infrastructure to reliable and functional operation. Break-fix activities apply to ICT Facilities Infrastructure that is not functioning according to specification as well as functioning but has some condition that may prevent it from functioning in the near future.

When a call is logged with the Service Provider relating to an ICT Facilities Infrastructure incident the Service Provider must dispatch a technician to inspect, diagnose and repair the equipment or components thereof as required to restore the ICT Facilities Infrastructure to its working specifications.

Any Break-fix activity necessitating a Change to the ICT Facilities Infrastructure to must be done in accordance with SARS Change Management procedures. No work may proceed until such authorisation has been given to the Service Provider by the ICT Facilities Team. The ICT Facilities Team may, at the time of logging the incident with

the Service Provider, give immediate authorisation to proceed with Break-fix activities as soon as the problem has been diagnosed.

All calls, service activities, requests etc. will be accompanied by a SARS call reference number, which must be referenced for all aspects of call tracking, payment etc. The service provider may additionally provide a reference number, at their discretion.

The Service Levels of Time to Respond (TTRespond) and Time to Repair (TTR) according to the metal and Service Coverage Period for a site will be used to measure service performance as defined in ICT Facilities Services Agreement.

In high impact situations, SARS will notify the Service Provider and the Service Provider must attend to the incident without delay.

Where the cost to repair an item of ICT Facilities Infrastructure exceeds 60% of the equipment replacement price, an "Uneconomical to Repair" (UTR) report should be submitted by the Service Provider to SARS, along with a quotation to replace the faulty equipment or unit with a new or equivalent unit.

No payment, including for travel charges, will be made in connection with unsuccessful Break-fix activities.

Repeated Incidents must be investigated by the Service Provider to identify the underlying cause (Problem identification/Root cause analysis). In the case of an intermittent problem, or where a definite cause cannot be found, the Service Provider must inform SARS accordingly, and present a plan of action on how the problem will be addressed. Problems identified to be caused by the Service Provider will result in no payment for the associated Break-fix activities performed by the Service Provider.

Replacement parts must be new, unless agreed otherwise by SARS.
Genuine parts from sourced from approved suppliers must be used, unless agreed otherwise by SARS.

In the event of new equipment being installed in SARS Server rooms by third party suppliers, the warranty agreement for the new equipment may be ceded to the Service

Provider. In such cases, the Service Provider will ensure that the necessary required scheduled preventative maintenance is done, will attend to any faults or problems, and will manage any warranty claims against the original equipment supplier.

Costs relating to parts for Break - Fix calls for ICT Facilities Infrastructure under warranty would be recovered from the original supplier as a warranty claim unless shown to be caused by SARS.

5.4. ICT Facilities Infrastructure upgrades and replacements

Modifications and upgrades to ICT Facilities and ICT Facilities Infrastructure may be required from time to time to meet the changing needs of SARS. The Service Provider will be required to supply such equipment on a Pass-Through-Basis. The Service Provider will be required to provide a quote to conduct the installation and commissioning and such quote will be in line with the personnel rates submitted in the Service Provider's Proposal.

5.5. Projects

From time to time SARS may wish to conduct projects to, for example, upgrade ICT Facilities Infrastructure at all sites. This would manage by means of a project and the Service Provider may be required to provide project management services to co-ordinate the activities of the project.

5.6. General Housekeeping

At every visit to an ICT Facility the Service Provider must perform general housekeeping activities. This includes cleaning, tidying, reporting of equipment not belonging in an ICT Facility or suspicious items. This would also include the compliancy of cabling, trunking and items stored and racked.

The Service Provider is required to report any circumstance or condition that appears irregular to the ICT Facilities Team.

The Service Provider is expected to co-ordinate activities with the building cleaning service provider to effect the necessary cleaning.

The Service Provider must take digital photographs before and after undertaking any Inspection, Maintenance or Break-fix activities

The Service Provider must perform asset verification on all ICT Facilities Infrastructure assets in the ICT Facility as part of every inspection and maintenance schedule. The Service Provider request an asset sheet from SARS before every visit to an ICT Facility and must immediately report every discrepancy from the supplied asset sheet to SARS.

5.7. General responsibilities

The Service Provider will be responsible for maintaining the ICT Facilities Infrastructure in a good functional working condition to provide optimal availability of services through a clean, safe and stable environment. This will be achieved through regular site inspections, routine maintenance, and quality service and repair calls.

In all cases the technicians performing the servicing must be trained, qualified, certified, and fully conversant with what needs to be done.

Any faults or problems found must be reported to SARS and attended to as expediently as possible.

The Service Provider personnel visiting SARS offices must function as the 'eyes, ears and hands' of the SARS ICT Facilities Team, providing an important link in the chain for maintaining the sites in optimum condition.

Should SARS wish to include additional types of ICT Facilities Infrastructure in the scope of the contract, Service Levels and costs that would apply to new categories of ICT Facilities Infrastructure would be negotiated and agreed at the time between SARS and the Service Provider.

The Service Provider must provide telephonic support, at no charge, to SARS if and when required, for assistance with the resolution of incidents, problems, faults, crisis situations, general queries, advice on design and equipment choice etc.

5.8. Management and Reporting

Call Management

A contact point must be provided by the Service Provider for call logging, reporting, escalation, call tracking, and other related communication between SARS and the Service Provider. The contact point must be available to take calls 24x7.

All calls must be referenced to the SARS Incident number and tracked to completion, with prompt feedback and reports provided to SARS.

A service report must list the main items being inspected, maintained or repaired and signed by the technician as having been completed. The service report must be countersigned by the onsite SARS contact person.

Problem Determination and Incident Management

From time to time and on request by SARS, Service provider will supply support resources for problem determination.

The Service Provider will ensure that that the correct resources are applied to resolving incidents and problems.

Incident tracking and follow through must be provided to ensure that incidents are completely and satisfactorily resolved, and to keep SARS informed of the call status.

The Service Provider must keep a call log and evaluate incident records to identify and analyse unreliable equipment, repeat calls, or any out of line situations. This should be reported to SARS at review meetings, or immediately for urgent exceptions.

Records

The Service Provider must keep records in their own system regarding the performance of all activities, including: -

- Callout for repairs etc.

- call priority level; arrival time at site; completion time; permanent or temporary correction; description of action taken, parts replaced

- a service report signed off by the SARS Site contact

- Inspection and maintenance activities

- Inspection / maintenance schedule

- actual maintenance activities done and how it accords with the schedule agreed with SARS.

- a service report reflecting the agreed checklist signed off by the SARS site contact

In addition to the above the Service Provider must keep the SARS Incident Management system (Remedy) up to date as required by SARS procedures.

For delivery of goods to a SARS site by the Service Provider a proof of delivery form must be completed and signed by the SARS onsite contact person.

All invoices submitted to SARS must be accompanied by the completed and signed off service report(s) or proof of delivery form(s).

Quotes should be delivered to SARS within 2 business days of being requested by SARS.

Invoices for all work completed during a calendar month must be delivered to SARS within 5 business days of the end of the month.

Monthly Reports

Monthly reports must be provided on all call and maintenance activities.
The Bidder must provide examples of the monthly report that it would provide. The details, which may include the proposed monthly report content as well as other requirements, will be finalised during transition.

Review Meetings

Review meetings between SARS ICT Facilities and the Service Provider will be held at agreed intervals to discuss activities and performance, and to plan the ongoing maintenance operations.

Special meetings may at times be called to discuss urgent matters, crisis situations emergencies etc.

Oath of Secrecy Declaration

All Service Provider personnel and sub-contractor personnel who will be working at SARS sites will be required to sign a SARS Oath of Secrecy declaration.

5.9. Quality of Work

The service provider will be fully responsible to maintain the ICT Facilities Infrastructure at a level of reliability and performance as to ensure optimum availability to SARS.

5.10. Performance Management

The satisfactory performance of the maintenance contract is of high importance to SARS, as the reliable operation and availability of the ICT Facilities Infrastructure is a key component to the availability of SARS's ICT Services. The Bidder is directed to refer to the ICT Facilities Services Agreement for the provisions governing the management service levels and the consequences of not meeting Service Levels.

6. **Transition Phases**

6.1. **Pre-Transition (After Award until contract signature (Effective Date))**

After the award of the RFP the contract will be finalised and signed and it is anticipated that this period should last no longer than 3 months

During this the period the appointed Service Provider will be engaged in the performance of maintenance and break-fix activities at the personnel rates set out in the Service Provider's proposal. Travel costs will be paid at the rates set out per visit in the Service Provider's Proposal. The Bidder must note that the price for travel includes the technician's time during travel.

6.2. **Transition: After the Effective Date until Commencement Date**

The Service Provider will commence transitioning the services to the model in the contract. The transition will include the following activities:

- SARS induction

- Process development

- Training on the SARS incident management system (Remedy)

- Handover visits (Site visits)

- Identify immediate stabilisation initiatives

- Contract education for both SARS and the Service Provider

- Review equipment inventory lists during handover site visits.

Remedy training will be provided to the Service Provider staff at SARS Head Office in Pretoria. The Service Provider must make arrangements to attend the training at its own costs. The cost of the actual training will be provided free of charge by SARS.

During this period the Service Provider will perform maintenance activities to the schedules on a Time and Materials basis and perform break-fix activities at the rates provided by the Service Provider's in its Proposal under 'Transition'.

The Transition Phase ends on the Commencement Date which is the earlier of:

- The date on which the transition deliverables have been signed off;

- A date set by mutual consent

- 3 months

6.3. Final mode of operation: After the Commencement Date

The Service Provider will commence delivering services in the final mode of operation as contemplated in the contract. From the Commencement Date onwards

- Final Mode pricing applies

- Service Levels apply

- All other contractual obligations are due.

7. RFP Requirements.

Note that the material required to be submitted with the Bidder's Proposal are to be included in addition any documents requested elsewhere in the RFP pack and must be included in accordance with the instructions in the RFP main document.

7.1. Bidder Experience

A Bidder must have previous experience and a verifiable track record of supplying the Services (in ICT related Facilities) to customers similar in complexity to the SARS requirement.
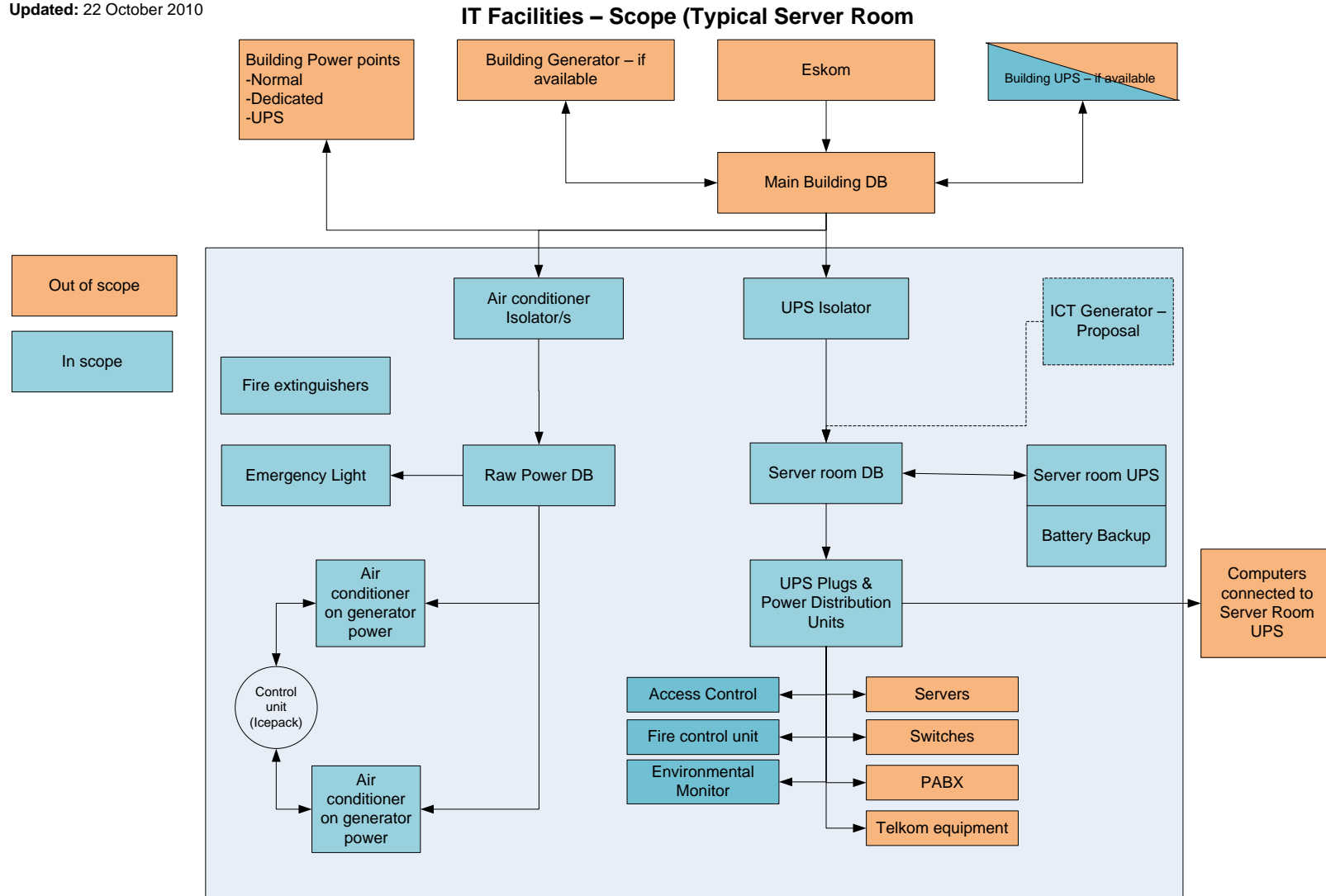
7.2. Subcontractors

The successful Bidder must make use of qualified subcontractors to perform the various specialised work activities but will remain responsible for the delivery of services to SARS as the contracted Service Provider. All communication regarding the delivery of the Services will be between SARS and the Service Provider. SARS will not make communications on behalf of the Service Provider to its subcontractors.

The subcontractors must be adequately qualified and experienced to handle the required work, and have sufficient resources to meet the SLA requirements at an acceptable level of quality.

- A "CV" must be submitted for proposed subcontractors outlining their experience, structure, resources and geographical coverage.

- Subcontractor's details must be included.

Appendix A: Support Model

Updated: 22 October 2010

IT Facilities – Scope (Typical Server Room

Appendix B: Support and Pricing Model

Scope	Inspection / Maintenance	Break-Fix	Upgrades/Replacements	New Equipment
Pre-Transition - From RFP award to Contract signature				
All ICT Facilities Infrastructure	• Time and materials basis • On request by SARS • Driven by checklist • Consumables charged at fixed % mark-up. • Travel charge as per Proposal	• Time and materials basis • On SARS logging an incident • Parts charged at fixed % mark-up. • Travel charge as per Proposal	• On SARS requesting a quotation • Parts provided on Pass-through-basis • Delivery / Installation / commissioning charged on Time and materials basis • Travel charge as per Proposal	• On SARS requesting a quotation • Parts provided on Pass-through-basis • Travel charge as per Proposal
Transition - From Contract signature to Commencement Date				
All ICT Facilities	• Time and	• On SARS logging	• On SARS	• On SARS

Infrastructure	materials basis • On request by SARS • Driven by checklist • Consumables charged at fixed % mark-up. • Travel charge as per Proposal	an incident • Fixed incident rate charged per incident. • Parts charged at fixed % mark-up. • Travel charge as per Proposal	requesting a quotation • Parts provided on Pass-through-basis • Delivery / Installation / commissioning charged on Time and materials basis • Travel charge as per Proposal	requesting a quotation • Parts provided on Pass-through-basis • Travel charge as per Proposal
Final mode of operation - From Commencement Date onwards				
All ICT Facilities Infrastructure	• Monthly fee basis • Driven by schedule and checklist • Consumables charged at fixed %	• Monthly fee basis • Break-fix when SARS logging an incident. • Must meet Service Levels	• On SARS requesting a quotation • Parts provided on Pass-through-basis	• On SARS requesting a quotation • Parts provided on Pass-through-basis

	mark-up. • Travel charge as per Proposal	• Travel charge as per Proposal • Parts charged at fixed % mark-up.	• Delivery / Installation / commissioning charged on Time and Materials basis • Travel charge as per Proposal	• Travel charge as per Proposal

Appendix C: Minimum Maintenance Requirements (Air-conditioning)

The following Quarterly and Annual Maintenance activities are minimum requirements for air-conditioning equipment, and neither preclude nor limit any manufacturers' or other recommended maintenance requirements.

Normal routine maintenance activities should all be done, and must at least include the activities outlined in the following paragraphs of this section.

Quarterly Maintenance Service (Minimum requirements): -

- Clean Units, filters, cooling coils etc.
- Visual inspection for leaks, cracks, damage, or any other mechanical or structural problems. Include all units & pipe-work.
- Inspect the air-conditioning electrical system for any problems, damage or safety risks. Ensure proper operation & integrity.
- Measure electrical current draw of compressor, and if not within normal range, find out why and take corrective action
- Check & correct gas pressures, and verify proper operation of the system
- Check drainage system, clean, and verify proper operation. Check no blockages or air-locks in drain pipes, and ensure no sagging or kinks.
- Test unit operation and demonstrate proper operation to SARS representative.
- SARS representative to sign the completed service report.

Annual Maintenance Service (Minimum requirements): -

Perform Quarterly Service, plus at least the following minimum requirements: -

- Detailed inspection for leaks, cracks, damage, or any other mechanical or structural problems. Include all units & pipe-work.
- Detailed inspection of the Electrical system for any problems, damage or safety risks. Ensure proper operation & integrity.
- Check the condensate drainage system, clean, and verify proper operation. Check no blockages or air-locks in drain pipes, and ensure no sagging or

kinks. Purge drain pipes with compressed air to remove any build-up of deposits.

- Check External coils for damage, soiling or corrosion, and acid wash if necessary.

Appendix D: Minimum Maintenance Requirements (UPS)

The following six monthly service and Maintenance activities are minimum requirements for UPS equipment, and neither preclude nor limit any manufacturers' or other recommended maintenance requirements.

Normal routine maintenance activities should all be done, and must at least include the activities outlined in the following paragraphs of this section.

Six Monthly Maintenance Service (Minimum Requirements): -

- Clean units, filters, batteries etc, and perform all safety checks.
- Verify integrity and safety of all electrical wiring and grounding.
- Inspect all capacitors, and note for later attention any that may need replacement.
- Inspect all connections, lugs, wiring and circuit breakers for loose, overheating or burnt condition.
- Check that all fans are running properly without signs of damage or wear.
- Perform all electrical measurements and adjustments.
- Inspect batteries for corrosion, swelling or other damage, loose connections, and clean the terminals and cabinet. Verify that battery voltages are ok.
- With UPS running on load from batteries, Measure and record the battery voltages. Identify any bad batteries for replacement.
- Provide a report and quotation for the replacement of UPS Batteries that are faulty, or have reached end of life for reliable performance
- At completion of work, ensure that all safety covers etc are in place, and provide a report on measurements and findings, along with a quotation for the actions needed to fix any problems.
- Any safety issues should be attended to immediately, as should any minor repairs or adjustments that may be needed. Should this incur Time and Material charges, prior authorisation must be obtained from the SARS ICT Facilities Team before proceeding.
- Submit a report on the service outcome, with recommendations and quote for any repairs, replacements or work that needs to be done.

Appendix E: Minimum Maintenance Requirements (Electrical Reticulation)

The ICT Facility electrical reticulation must be checked and serviced annually to ensure reliable and safe operation, and compliance with electrical codes.

The following annual maintenance activities are minimum requirements for ICT Facilities electrical installation. (Electrical reticulation, DB's, lighting, plugs, grounding etc.)

These requirements neither preclude nor limit normal electrical safety and integrity inspections, or other recommended maintenance activities.

Normal routine maintenance activities should all be done, and must at least include the activities outlined in the following paragraphs of this section.

LT Reticulation

Annual Maintenance Service: -
Normal electrical maintenance activities should be performed, and must include at least the following: -
- DB's must be cleaned and inspected for any wiring problems, burned wires, hot connections, safety hazards, and earth integrity.
- All circuit breaker, bus-bar, neutral and earth connections must be checked and screws tightened where loose.
- Burned or hot circuits must be checked for overload or bad connections, and any damaged components replaced.
- The power load on the board should be checked, and any overload condition reported to SARS ICT Facilities Team.
- Where relevant the earth leakage unit must be tested for correct function.
- Lights, plugs, switches and wiring must be checked for proper operation and safety.
- Any safety issues should be attended to immediately, along with any minor repairs or adjustments that may be needed. Should this incur Time and

Material charges, prior authorisation must be obtained from the SARS ICT Facilities Team before proceeding

Appendix F: Minimum Maintenance Requirements (Generator)

The Generator and alternator must be checked and serviced annually to ensure reliable and safe operation.

The following annual Service and Maintenance activities are minimum requirements for a generator.)

These requirements neither preclude nor limit normal electrical safety and integrity inspections, or other recommended maintenance activities.

Normal routine maintenance activities should all be done, and must at least include the activities outlined in the following paragraphs of this section.

Weekly:

Before start-up:

- Check battery terminals for tightness
- Check water level in radiator
- Check oil level in sump
- Check connections on starter
- Check voltage of starter battery
- Check temperature of immersion heater system
- Check charge alternator en fan belts
- Check condition of Starter batteries and terminals

During start-up: No- load test run

- Observe ease of starting – machine does not struggle to start – can indicate started bearing or battery faulty

After start-up: No-load test run

- Check for water leaks
- Check for oil leaks
- Check battery charging voltage
- Check for vibrations on alternator – Vibration could indicate faulty bearings
- Check for vibrations

- Check output voltage
- Check output frequency
- Record hours run
- Record fuel level

Monthly

Before start-up: On load test

- Do weekly before start-up checks
- Check mains load

During start-up: No- load test run

- Observe ease of starting – machine does not struggle to start – can indicate starter bearing or battery faulty or load could be to big on start-up

After start-up: On load test

- Check and record changeover time
- Check for water leaks
- Check for oil leaks
- Check battery charging voltage
- Check for vibrations on alternator – Vibration could indicate faulty bearings
- Check for vibrations
- Check output voltage
- Check output frequency
- Record hours run
- Record fuel level
- Record load levels

Annually

Before start-up

- Put generator on OFF position
- Commence with service:
  o Drain oil
  o Remove oil filters
  o Remove air filters
  o Remove fuel filters

- o Replace oil
- o Replace oil filters
- o Replace/clean Air filters
- o Replace fuel filters
- o Check for leaks
- o Top up radiator water
- o Replace/check charging alternator belts
- o Check engine mountings
- o Check alternator mountings
- o Check electrolyte levels in starter batteries (If possible)
- o Clean, tighten and re-grease battery terminal
- o Re-Check all fluid levels in generator – Oil and Water and top-up if needed
- o Put generator in "On" position

During start-up: No load test run

- Observe ease of starting – machine does not struggle to start – can indicate started bearing or battery faulty

After start-up: No Load test run

- Check for water leaks
- Check for oil leaks
- Check battery charging voltage
- Check for vibrations on alternator – Vibration could indicate faulty bearings
- Check for vibrations
- Check output voltage
- Check output frequency
- Record hours run
- Record fuel level

Appendix G: Minimum Maintenance Requirements (Fire Prevention and Control)

The following annual service and maintenance activities are minimum requirements for Fire and Safety equipment, and neither preclude nor limit any manufacturers' or other recommended maintenance requirements.

Requirements will differ from office to office, depending on what equipment is installed. This section addresses the principles rather than the letter of what is required.

Any maintenance work, tests or certification required for compliance to fire department or legislative regulations must be included as part of the maintenance program.

The replacement of backup batteries must be included in the six monthly maintenance service at least every second year to reduce the risk of failure.

Six Monthly Maintenance Service: -
- Normal routine maintenance activities must all be done, and the systems, controllers etc. tested for proper operation (except for the actual release of gas).
- Gas cylinders, valves, piping, nozzles etc. must be inspected and confirmed to be in good functional condition.
- Smoke detectors, water sensors etc. must be cleaned and tested for correct operation, and system outputs such as alarms, escape door release operation, warning signals, alarms etc. must be tested and validated for proper operation.
- The comprehensive check and maintenance must be done every 6 months, followed by the necessary actions to achieve certification, meet code regulations, or repair any problems.
- Likewise, Rescue and Safety equipment, BA sets, etc. must be serviced and confirmed to be in good functional condition.

- Testing and certification of pressure cylinders must be done according to regulations.
- All necessary certificates must be provided to SARS ICT Facilities, and "service stickers" affixed to the relevant equipment.
- An onsite log must be placed adjacent to or inside each fire system control box to confirm maintenance activities, and to track work done.

Appendix H: Minimum Maintenance Requirements (Access Control)

There is not normally any routine maintenance activity required by ICT Facilities Access Control systems, but door locks, Mag-locks, readers etc. must be checked for condition and correct functioning at least once every 6 months. This will be scheduled to coincide with other maintenance visits.

Should any faults or problems be found where the access control is part of the building system, SARS ICT Facilities Team must be notified in order to arrange for repairs.

Where the Access control is a standalone system for the ICT Facility only, and not part of the building system, then a request would be made to the Service Provider to attend to the repairs as a T&M call.

Appendix I: Minimum Maintenance Requirements (Environmental Monitoring)

Environmental monitoring is currently done via an APC NetBotz system.

This equipment does not require any routine maintenance other than an annual cleaning and inspection of all wiring, connections and sensors to ensure that they remain in good condition. Adjustments may be needed from time to time, for which a request would be made by ICT Facilities.

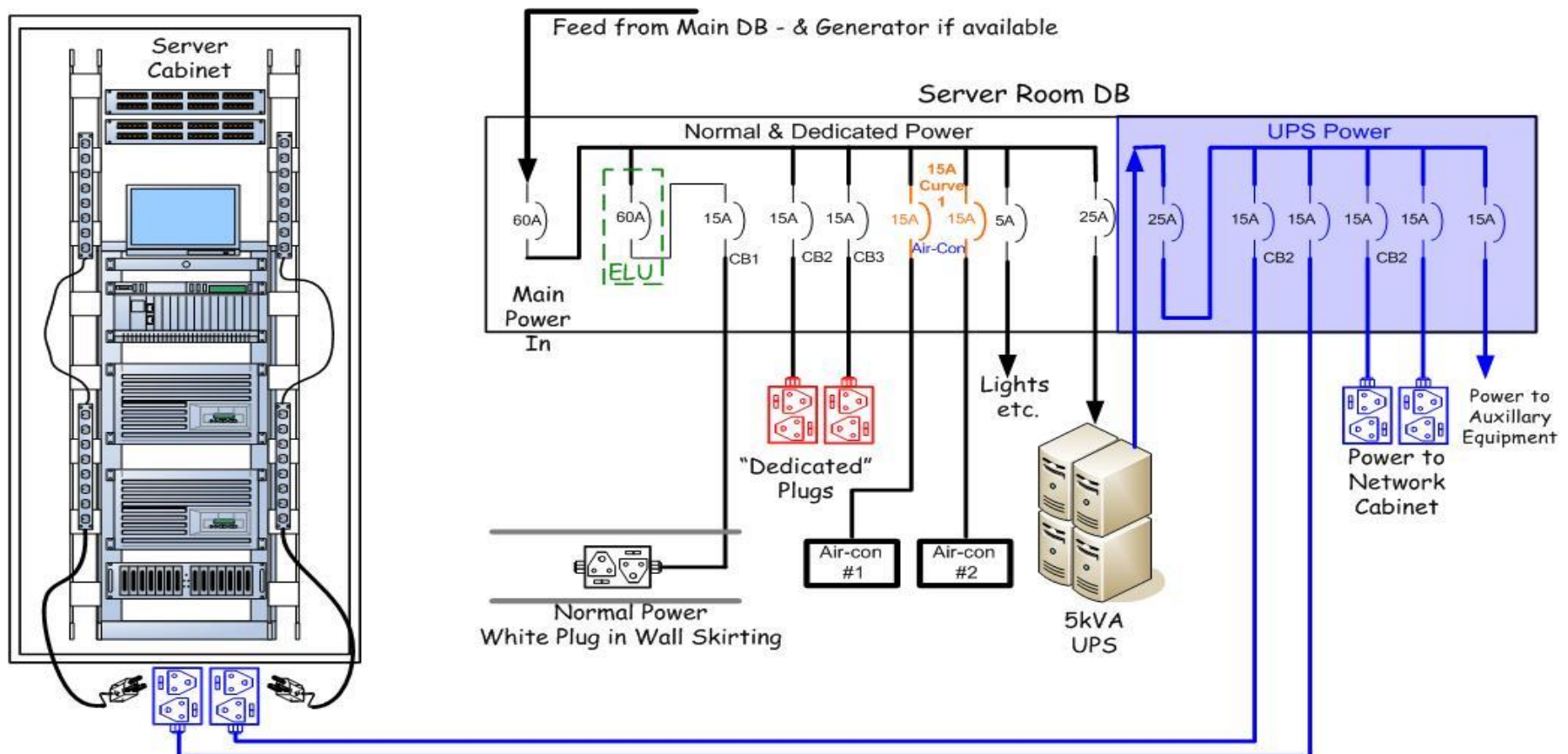This should best form part of the server room housekeeping activities.

Appendix J: Minimum Maintenance Requirements (ICT Facility Housekeeping)

The purpose of this requirement is to ensure that ICT Facilities remain in a good, clean, safe and functional condition and that any problems or breakages to structure, fittings etc get attended to and repaired.

- Faulty light bulbs or fluorescent tubes should be replaced as needed,, and light fittings confirmed as operational.

- Rooms should be clean, and floors swept clean and washed where necessary. Note that the Service Provider is required to co-ordinate the cleaning activity with the building cleaning service and not perform this duty itself.

- Any loose boxes, equipment covers, or junk should be reported to the SARS ICT Facilities Team for instructions as to what should be done with it. Any empty boxes, packing material or obvious rubbish should be disposed.

- A check of room fittings for loose or missing covers, faulty doors, broken locks, damage to floor or ceiling, etc., must be done, and attended to where possible. Any problems requiring subsequent repairs must be reported to ICT Facilities Team for follow up.

- A safety check must be done, and any problems attended to or reported.

- All ICT Facilities Infrastructure must be visually checked for normal error free operation, and any problems logged for follow up.

- A report should be provided to the SARS ICT Facilities Team briefly outlining the work done, results of the inspection, and general condition of the facility.

- Apart from routine inspection, cleaning, and adjustments, work done to rectify problems, disposal of junk or large repairs etc would be charged on a Time and Material basis.

Appendix K: Illustration of Server Room Electrical Layout (Small Server Room)

Example to Illustrate the Standard Concept
For Server Room Electrical Power Distribution

Feed from Main DB - & Generator if available

Server Cabinet

Server Room DB

Normal & Dedicated Power

UPS Power

| 60A | 60A | 15A | 15A | 15A | 15A | 15A | 5A | 25A | 25A | 15A | 15A | 15A | 15A | 15A |

ELU

CB1

CB2 CB3

15A Curver 1
Air-Con

Main Power In

"Dedicated" Plugs

Lights etc.

Air-con #1

Air-con #2

5kVA UPS

Normal Power White Plug in Wall Skirting

Power to Network Cabinet

Power to Auxillary Equipment

R G Howell   2007-11-19

Appendix L: Illustration of Server Room Electrical Layout (Large Server Room)

Single Line Diagram to Illustrate Principles for Power connections