



**THE REQUEST TO APPOINT A SERVICE PROVIDER FOR WHATSAPP
BUSINESS SOLUTION PLATFORM FOR A PERIOD OF FIVE (05) YEARS**

Virtual Briefing Session: 06 October 2022 at 10:00am

RFP No.: RFP 23/2022

Closing Date: 27 October 2022 @ 11:00am

New Closing Date: 09 November 2022@ 11:00am

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1. Introduction

NON- COMPULSORY BRIEFING SESSION

- Purpose:
 - Explain selected concepts, procedures and other aspects of the RFP
 - Confirm formal registration of Bidders for notices and other communications
- It may contain:
 - Additional information
 - Additional rules that must be adhered to
- It does not:
 - Cover every item in the RFP
 - Replace any of the issued RFP material
 - Change any of the RFP rules unless explicitly communicated in writing
- The briefing session slides will be emailed via the SARS Tender Office email address.
- The RFP pack remains the primary source of information for the Bidder to respond.

Procedures during Briefing Session

- Questions during the session.
 - SARS will take written questions submitted during the session
 - SARS will review and focus on most pertinent themes arising from the questions and provide answers where possible
 - All questions and answers will be published on SARS website to all the bidders as part of the wider Q & A process
 - The emailed answers will take precedence over any verbal response given in the briefing session
- The session is being recorded

2. Governance Requirements

- Strict communication channels
 - Bidders will be disqualified for non-compliance
- No solicitation of information will be allowed other than by prescribed channels
- Deadlines to be strictly met
- Adhere to prescribed submission format to ensure queries are properly dealt with

3. RFP Timelines

ACTIVITY	DATE DUE
Advertisement of Bid in the: <ul style="list-style-type: none">▪ SARS Tender Office	27 September 2022
Non-compulsory virtual briefing session	06 October 2022 at 10h00am
Last day for Bidders to submit written questions	20 October 2022
Last day for SARS response to Bidder's written questions	25 October 2022
Bid Closing Date	27 October 2022 at 11h00am
New Bid Closing Date	09 November 2022 at 11h00am
Notice to bidders	Jan / Feb 2023

4. Background & Purpose

Refer to paragraph 2 and 3 of the Business Requirement Specification (BRS):

SARS CONFIDENTIAL

SARS RFP 23/2022

**THE REQUEST TO APPOINT A SERVICE PROVIDER FOR WHATSAPP
BUSINESS SOLUTION PLATFORM FOR A PERIOD OF FIVE (05) YEARS**

BUSINESS REQUIREMENTS SPECIFICATION

5. Bid Evaluation Process (Refer to section 7 of the RFP Main doc)

Gate 0

Pre-Qualification

- Central Registration Report (Central Database System) from NT
- Tax Compliance Status Pin
- Invitation to Bid –SBD 1
- Declaration of Interest (SBD 4)
- Preference Point Claim Form – SBD 6.1
- Supplier Risk Questionnaire
- Agreement
- Annual Financial Statements

Gate 1

Mandatory Requirement

▪ **REGISTRATION WITH INFORMATION REGULATOR**

The Bidder must provide details of Information Officer and if any, Information Officer (s) registered with the Information Regulator and proof thereof.

▪ **BIDDER AUTHORISATION REQUIREMENTS**

The Bidder must submit an authorisation letter from Meta for WhatsApp Business Solution which confirms that the bidder is a registered Service Provider.

▪ **BIDDER FOOTPRINT**

The service provider must have local South African representation/footprint for maintenance and support.

5.1 Bid Evaluation Process (Refer to section 7 of the RFP Main doc)

Gate 2

Technical Evaluation

100 points

Achieve overall score of 70 points out of 100 points to proceed to Gate 3

Refer to Section 7.4 of the RFP Main Document (Technical Evaluation Criteria)

Gate 3

Price = 80

100 points

BBBEE = 20

- Valid B-BBEE Certificate/ Sworn Affidavit
- Preference Point Claim Form – SBD 6.1
- SARS RFP 23/2022 5-1: Price Response Template

5.2 Bid Evaluation Process (Refer to section 7 of the RFP Main doc)

No:	Evaluation Criterion	Detailed Criteria	Sub-Criteria	Weight
1.	Product / Service Functional Requirements	<p>Product / Service Functional Requirements</p> <p>The solution must align to SARS's expected uptime of near 100% for at least minimum operating times from 06:00 am to 18:00pm = (20)</p> <ul style="list-style-type: none"> • 98-100 = (20) points • 95 - 97 = (10) points • Less than 95 = (0) points <p><i>Substantiation: Bidders are requested to provide a minimum of 6 months previous performance report against Service Level Agreement to proof compliance to client's requirements, any bidder who fails to comply with this request will score zero.</i></p>	Attach evidence in the form of report	20

5.3 Bid Evaluation Process (Refer to section 7 of the RFP Main doc)

No:	Evaluation Criterion	Detailed Criteria	Evidence reference	Weight
2.	WhatsApp Message Volumes	<p>WhatsApp Message Volumes</p> <p>A solution must be able to service a minimum of 20,000 messages per day, with at least minimum operating times from 06:00 am to 18:00pm. The solution should be scalable to meet any potential growth = (20)</p> <ul style="list-style-type: none"> • Greater than 50,000 messages per day = (20) points • 20,000 to 50,000 messages per day = (10) points • Less than 20,000 per day = (0) points <p><i>Substantiation: Bidders are requested to provide proof of maximum messages sent per day based on the client coverage, any bidder who fails to comply with this request will score zero.</i></p>	Attach evidence in the form of report	20

5.4 Bid Evaluation Process (Refer to section 7 of the RFP Main doc)

No:	Evaluation Criterion	Detailed Criteria	Sub-Criteria	Weight
3.	WhatsApp Alerts and Health Performance Reporting	<p>Near real-time alerts and report on the health and performance indicators e.g. number of successfully delivered, failed messages etc. = (20)</p> <p>Near real-time alerts and scheduled reports on performance and health to designated group = (20) points</p> <ul style="list-style-type: none"> • Near real time alerts or Scheduled reports on performance and health to designated group = (10) points • No near real time alerts and no reports = (0) points <p><i>Substantiation: Bidders are requested to provide sample reports.</i></p>	<p>Attach evidence in the form of report</p>	<p>20</p>

5.5 Bid Evaluation Process (Refer to section 7 of the RFP Main doc)

No:	Evaluation Criterion	Detailed Criteria	Sub-Criteria	Weight
4.	Bidder Experience and Capability Requirements	<p>Does the bidder have prior experience in implementation of WhatsApp Business Platform in South Africa? = (15)</p> <p>The bidder must have provided WhatsApp Business Platform to a minimum of at least 3 customers with 20,000 message exchanges per day. Provide letters of confirmation from previous or current customers (Private or Government) to whom the project or service was successfully delivered or a sworn affidavit to this effect. Each letter must be dated and indicate:</p> <ol style="list-style-type: none"> The customer Company name and physical address. Customer contact person's name, position, telephone number and email address. Project scope of work. Project Start and End Date. <ul style="list-style-type: none"> ▪ 3 or more Customer Reference provided with 20,000 message exchanges per day for each reference = (15) points ▪ 2 Customer references provided with 20,000 message exchanges per day for each reference = (10) points 1 Customer reference provided with 20,000 message exchanges per day for each reference = (5) points ▪ No Customer reference = 0 points <p><i>Substantiation: Bidders are requested to provide updated proof of previous and/or current work done including signed testimonials on company letterheads. Any bidder who fails to comply with this request will score zero.</i></p> <p><i>NB: SARS reserves the right to conduct due diligence on the information provided.</i></p>	<p>The Bidder must provide reference letters to substantiate its claims</p>	<p>15</p>

5.6 Bid Evaluation Process (Refer to section 7 of the RFP Main doc)

No:	Evaluation Criterion	Detailed Criteria	Sub-Criteria	Weight
5.	Project Schedule / Duration	<p>What will be the timelines for the implementation of a WhatsApp Business Platform? = (15)</p> <ul style="list-style-type: none"> • Implementation plan with a detailed schedule and milestones for a period not exceeding 3 months. = (15) points • Implementation plan with a detailed schedule and milestones for a period between 3 - 6 months. = (10) points <ul style="list-style-type: none"> • No implementation plan or exceeds 6 months = (0) points <p><i>Substantiation: Bidders are requested to provide proof of documentation of previous successful project implementation. (Detail packages and deliverables must be clearly outlined together with the effort required.)</i></p>	<p>Attach schedule</p> <p>What will be the timelines for the implementation of a WhatsApp Business Platform?</p>	15

5.7 Bid Evaluation Process (Refer to section 7 of the RFP Main doc)

No:	Evaluation Criterion	Detailed Criteria	Sub-Criteria	Weight
6.	Training Requirements	<p>The Bidder to provide ongoing training for the enablement of SARS resources to be able to provide support to SARS internal and external customers.</p> <p>The Bidder will be expected to provide support services which will include fault or query escalation process. = (10)</p> <ul style="list-style-type: none"> • Comprehensive training proposal that complies with all material aspects achievable that caters for both classroom and eLearning i.e. training schedules, manuals and any other related evidence = (10) points 	<p>Bidders are requested to provide training schedules, manuals, solution end-to-end presentation and any other related evidence</p>	10

6. Bid Evaluation Process Gate 3 - Price

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 must refer to Annexure B – Pricing Schedule

Adjudication Criteria	Points
Price Evaluation	80

$$P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$$

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

6. Continues....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/Affidavit.	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.

6. Continues...B-BBEE Certificate/Affidavit

The table below indicates the specific B-BBEE certification documents that must be submitted for this tender.

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 – only 51% and above Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency.
Large Enterprise (LE)	Above R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited rating agency.

Incorporated JVs must submit the B-BBEE status of the entity. Unincorporated JVs must submit a consolidated B-BBEE certificate as if they were a group structure for every separate Bid.

6. Continues...Use and acceptance of Affidavits

Section 1.6 SBD 6.1 states.. The purchaser reserves the right to require of a bidder, either before a bid is adjudicated or at any time subsequently, to substantiate any claim in regard to preferences, in any manner required by the purchaser.

SARS reserves the right to request that bidders submit proof of their Black ownership and turnover information in support of their Affidavits.

6. Continues...B-BBEE Key Sections to complete in SBD 6.1

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 4.1

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 4.1 and must be substantiated by relevant proof of B-BBEE status level of contributor.

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 or QSE?

(Tick applicable box)

YES	<input type="checkbox"/>	NO	<input type="checkbox"/>
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6. Continues... SBD 6.1 sub-contracting

v) Specify, by ticking the appropriate box, if subcontracting with an enterprise in terms of Preferential Procurement Regulations, 2017:

Designated Group: An EME or QSE which is at last 51% owned by:	EME √	QSE √
Black people		
Black people who are youth		
Black people who are women		
Black people with disabilities		
Black people living in rural or underdeveloped areas or townships		
Cooperative owned by black people		
Black people who are military veterans		
OR		
Any EME		
Any QSE		

6. continues.... Sub-contracting

Bidders who want to claim preference points will have to comply fully with regulations 6(5) and 12(3) of the Preferential Procurement Regulations, 2017 with regard to sub-contracting:

Regulation 6(5)

- A tenderer may not be awarded points for B-BBEE status level of contributor if the tender documents indicate that the tenderer intends subcontracting more than 25% of the value of the contract to any other person not qualifying for at least the points that the tenderer qualifies for, unless the intended subcontractor is an EME that has the capability to execute the subcontract.

Regulation 12(3)

- 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.

Proof of Existence: Joint Ventures and/or Sub-Contracting

- 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.
- Incorporated JVs must submit the B-BBEE status of the entity. Unincorporated JVs must submit a consolidated B-BBEE certificate as if they were a group structure for every separate Bid.

7. Financial Analysis Evaluation

Bidders are required to submit the public interest score and complete sets of audited / independently reviewed annual financial statements in compliance with the Companies Act for the three (3) most recent financial periods in the name of the bidding entity. The financial statement analysis will be conducted on the shortlisted bidders.

The annual financial statements must contain:

- Statement of Profit and Loss and Other Comprehensive Income;
- Statement of Financial Position;
- Statement of Cash Flows;
- Statement of changes in equity/ net assets ; and
- Accompanying Notes.

Entities which are trading for less than three (3) financial periods must provide:

- A letter detailing that fact, signed by a duly authorised representative of the entity;
- The annual financial statements that the entity is able to provide, taking into account the period that it has been trading; and
- Any other information or documentation which would provide more clarity on the financial history of the bidder.

7. continues... Financial Analysis Evaluation

In the event of the bid being in the form of a Joint Venture (JV), the following is required:

- Annual financial statements of the JV for a registered JV and for unincorporated JV annual financial statements of each company;
- A JV legal agreement detailing the percentage ownership of each entity; and
- A consolidated B-BBEE Certificate.

SARS reserves the right to request further information with regards to the annual financial statements of a bidder at a later stage.

8. SERVICE AGREEMENTS

Bidders 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 the successful bidder if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.

9. BID SUBMISSION

Bidders must submit copies of each file (Original and Duplicate) and a USB with content of each file by the **27 October 2022 at 11:00am**

Bid documents will only be considered if received by SARS before the Closing Date and time.



TENDER BOX

Tender Office SARS Procurement, Lehae La SARS
Head Office, 299 Bronkhorst Street Nieuw
Mucleneuk, Pretoria

Any enquiries must be referred, in writing via email:
tenderoffice@sars.gov.za

FILE 1: ORIGINAL / DUPLICATE

Exhibit 1

Pre-qualification documents

Section 1

- Pre-qualification documents (SBD documents)

Section 2

- Mandatory Response Template
- Technical Responses
- Supporting documents for technical responses
- References/testimonials/CVs
- 3 years audited /reviewed Financial statements

Section 3

- Company profile
- Supplementary information

Section 4

- Signed Agreement



FILE 2: ORIGINAL / DUPLICATE

Exhibit 1

Pricing Schedule



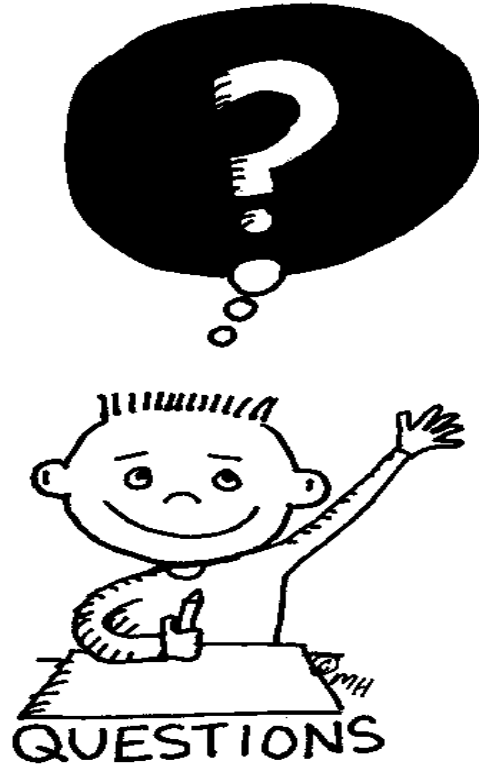
Exhibit 2

- B-BBEE Certificate/ Sworn Affidavit
- SBD 6.1



NB ! Each file must be marked correctly and sealed separately for easy reference during the evaluation process. USB must be marked with Bidder Name

10. QUESTION AND ANSWERS



Thank you
Re a leboha
Re a leboga
Ndza Khensa
Dankie
Ndi a livhuwa
Ngiyabonga
Enkosi
Ngiyathokoza