**RFP 13/2024: Online Training Platform**

**Question & Answers**

**Closing Date: 12 February 2025 at 11:00**

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| **#** | **Question** | **Answer** |
| 1. | **Content and Curriculum**   * + Content Customization: Can the training content be tailored to SARS-specific processes or challenges, such as tax-related analytics or compliance systems?   + Are there any proprietary systems or tools used by SARS that need to be integrated into the training curriculum? | Please refer to: Annexure D – Business requirements Specification.  No systems or tools that need integration. |
| 2 | Local Relevance: How important is it for the training to include examples or case studies relevant to South Africa’s regulatory environment and SARS objectives? | Please refer to: Annexure D – Business requirements Specification. |
| 3. | **Skill Levels, Progression, and Metrics for Success**   * 1. Skill Progression: Should the training paths include intermediate milestones or certifications to track incremental progress?   2. Does SARS expect learners to transition between different levels during the program? If so, how should this be managed (by SARS, the provider, or self-assessment)?   3. Is the training expected to be self-paced or facilitated? We recommend our standard blended approach combining online and facilitated learning. | Skill-Based Learning Paths: Tailored learning paths guide learners through a structured sequence, from beginner to advanced,  Certifications and Badging: Industry-recognized certifications and badges on all the topics required by SARS.  Analytics and Reporting: Analytics that track learner progress, completion rates, and skill assessments.  Instructor-Led Training (ILT) and Mentorship: Offer ILT sessions, providing opportunities for questions and answers, mentorship with subject matter experts. |
| 4. | Soft Skills: Should the training include non-technical skills such as leadership, communication, governance, ethics, and change management to support SARS’s transformation goals?   * + Should content be tailored for different organizational levels (e.g., Junior, Intermediate, Senior, and Executive)? | Please refer to: Annexure D – Business requirements Specification. |
| 5. | How will success be defined and measured during the implementation period and the subsequent three-year period?   * 1. Does SARS have specific KPIs or success metrics for evaluating the project’s performance?   Metrics for Success: | Bidder Bidder must provide details of how they will manage challenges related to:  Employee Engagement and Retention: Overcoming the challenges of motivating employees to complete training programs and retain information, especially in self-paced courses.  Measuring ROI and Skills Impact: Addressing the difficulty of assessing the return on investment (ROI) and practical impact of skills acquired through online learning. |
| 6. | **Certifications**   * 1. Regulatory Accreditation:   + Are certifications required to be accredited by South African regulatory bodies such as the QCTO or CHE?   + If so, are there specific NQF levels or qualifications SARS expects to align with? | Not a requirement to be accredited by South African regulatory bodies. |
| 7. | **Industry-Recognized Certifications:** Will SARS accept internationally recognized certifications from providers like AWS, Microsoft, or Salesforce?   * 1. Are certifications from sector-specific bodies (e.g., DAMA) acceptable? | Yes |
| 8. | Custom Certifications:   * Can the service provider issue business-specific certifications aligned with SARS’s needs?   + Are branded certificates of completion or micro-credentials acceptable for non-core topics? | Yes |
| 9. | **Micro-Credentials and Badging:**   * Is SARS interested in module-specific completion badges to track incremental progress?   + Should these micro-certifications align with a broader qualification framework? | Yes and if possible, should align with a broader qualification framework. |
| 10. | Recognition of Prior Learning (RPL):  • Will SARS recognize employees' existing qualifications and prior learning when determining their training requirements? | Yes |
| 11. | Stackable Certifications:  • Does SARS prefer modular programs that culminate in higher qualifications (e.g., diplomas, degrees)?  • Should certifications support career progression within SARS? | No but if service provider can offer these – they are welcomed. |
| 12. | Mandatory vs. Optional Certifications:  • Are certain certifications mandatory for all employees, or are they role-specific?  • Should employees have the option to pursue additional certifications for professional development? | No mandatory certifications for employees, they can be role specific.  Yes. |
| 13. | Verification and Authentication:  • Does SARS require certifications with secure features such as digital verification or blockchain-based credentials? | The expectation is that the Service Provider will stay abreast of innovation and trends. |
| 14. | Renewal and Lifespan of Certifications:  • Should the training platform support certification renewals and recertification pathways? | Yes |
| 15. | Cost Responsibility:  • Will SARS cover certification costs, or should they be included in the service provider’s pricing proposal? | Certification costs should not be included in the service provider’s pricing proposal as SARS does not require certification. |
| 16. | **Management and Supervision**  Engagement and Reporting:   * + What reporting mechanisms are required to track employee progress, and how frequently should updates be provided?   + Should the learning platform integrate with SARS's internal HR systems?   + Is there a preference for dashboards or real-time analytics? * Are course completion transcripts required for learners? | Analytics and Reporting: Analytics that track learner progress, completion rates, and skill assessments.  learning platform integrate with SARS's internal HR systems? No.  Not a requirement but no harm in providing completion transcripts |
| 17. | SARS Management Involvement:   * What level of involvement is expected from SARS management in monitoring employee * Is SARS open to implementing a rewards and incentives program to support learning outcomes? | SARS management will monitor utilisation of employees subscribed to the training platform. |
| 18. | **Learning Environment and Access**  Blended Learning Options:   * Is SARS open to hybrid learning models, combining self-paced learning with virtual workshops or mentorship? | SARS SARS requires innovation and trends in online training platform. This includes the following:   * **AI and ML Integration for Personalized Learning:** Incorporate AI-driven recommendations and adaptive learning pathways based on user performance, creating a tailored learning experience. * **Micro-Learning and Just-in-Time Training:** Offer short, targeted modules that provide flexible, bite-sized learning for professionals to acquire skills on demand. * **Immersive Learning (VR/AR) and Interactive Labs:** Utilise virtual reality (VR) and augmented reality (AR) technologies to simulate complex technical environments, particularly useful in hardware and systems training. * **Gamification:** Use of badges, quizzes, and leaderboards to boost engagement, particularly in longer technical courses. |
| 19. | Inclusivity and Accessibility:  • Are there specific accessibility requirements for employees with disabilities (e.g., screen readers)? | Please see response to question 18 above. |
| 20. | **Technical Requirements**  Device Compatibility:   * Should the platform support mobile access and offline learning for low-connectivity areas? | Yes |
| 21. | Data Residency and Security   * Does SARS require additional third-party audits or certifications for data security beyond those mentioned in the specification? | No. |
| 22. | Platform Integration:  • Are there existing or legacy systems (LMS, CMS, HR systems) that require integration for license management and user authentication?   * 1. • Are the following applications approved for use: Webinars: Zoom, MS Teams?   2. Office Tools: Excel, Google Suite?   3. Video Content: Vimeo, YouTube? | We do not plan to integrate the successful bidder’s Learner Management System (LMS) or HR system with SARS systems. - The platform must, however, provide real-time data extraction on license usage, course completion rates, and unused licenses. This will allow us to redistribute licenses efficiently.  - The system must also support multi-authentication for secure access.  - Approved Applications: - Webinars: Zoom and MS Teams are approved for use.  - Office Tools: Excel is essential for courses involving Big Data, Data Science, SQL, Python, etc. Google Suite is not a priority.  - Video Content: YouTube access can be granted if required for specific courses, but it must be restricted to course-related content. |
| 23 | **Outcome Measurement**  Skills Impact:   * How does SARS plan to measure the impact of training on employee performance and strategic objectives? * Are specific post-training assessments, such as projects or workplace evaluations, required? | Bidder Bidder must provide details of how they will manage challenges related to:  Employee Engagement and Retention: Overcoming the challenges of motivating employees to complete training programs and retain information, especially in self-paced courses.  Measuring ROI and Skills Impact: Addressing the difficulty of assessing the return on investment (ROI) and practical impact of skills acquired through online learning. |
| 24 | **Engagement with the Service Provider**  Implementation and Transition:   * What is the expected timeline for onboarding employees, and should implementation be phased? * Should the service provider support internal marketing to promote the program? | 2.3.7 Please refer to Annexure B – Technical Evaluation, section 6 and and main RFP Document section 2.3.7  Bidder Bidder must provide in their response:  A detailed project management plan that describes how the bidder intends to execute the implementation of the project related to:   * Introducing/launching the online training platform within SARS. * Onboarding of SARS employees |
| 25 | Assessment Requirements:  • Is a pre-qualification assessment required for specific courses? | No |
| 26 | **Additional Considerations**  Scalability:   * Will all 3,000 staff have access to the platform throughout the three-year period, or only in the first year? * Should the platform be scalable beyond the initial cohort if the program is successful? | 1000 employees per year and not more than 3000 employees over a 3-year period to access at any time. |
| 27 | Cultural Fit:  • Are there specific organizational values or cultural aspects that should be reflected in the training (e.g., ethics, public service orientation)? | Please refer to: Annexure D – Business requirements Specification. |
| 28 | Timelines:   * Is there an anticipated start date for the training program in 2025? | This will be discussed and agreed on with the awarded service provider. |
| 29 | Budget and Pricing:   * Does SARS have an allocated budget for this project? We will propose our pricing model | Yes, SARS has an allocated budget for this project. Please refer to: Annexure E – Pricing Template. |
| 30 | Following the non-compulsory briefing session, I would like to clarify the question on point 6.1 on page 6 of the General Conditions of Contract document pertaining to the payment of a performance security by the supplier to SARS within 30 days of receipt of the notification of contract award.  Kindly clarify what the expectation is from the bidder. | The GCC is automatically binding on all government tenders. However it allows for so called Special Conditions of contract which is the agreement that will be negotiated at award stage. This Agreement will set out service specific terms and conditions as well as setting out price, SLA's etc. And the successful bidder will be allowed to vet the agreement whereafter the terms and conditions will be negotiated. the GCCs are included at RFP stage to make bidders aware of the General conditions that is applicable. However bidders will note that it makes provision for so called special conditions of contract which will be drafted separately and negotiated which will be the main terms and conditions applicable to this appointment. Bidders should initial the GCC to acknowledge the terms and conditions that is automatically binding on all government tenders. Bidders can also, as part of their submission, provide its own terms and conditions if it is for instance a subscription license for SARS where SARS reserves the right to review / accept / reject such terms and conditions and enter into negotiations with the Service Provider. |
| 31 | 7.6 Financial Risk Analysis    The requirement to provide audited or independently reviewed financial statements for the past three years in line with the PIS could be challenging.    Preparing audited statements specifically for this RFP would incur additional time if it is something that we can provide.  **Question: Is this something that we can provide should we be selected.** | Please see Main RFP document, 7.2.3, Table 4: Prequalification criteria |
| 32 | 7.7. Recommended Due Diligence and Risk Assessment Prior to Award    SARS reserves the right to request compliance evidence from the bidder and third parties for due diligence and audit purposes. Additionally, the recommended bidder must consent to continuous and in-depth due diligence throughout the contract term to ensure ethical business practices.    We have 20,000 customers and cannot agree to any unique customer requirements for audit purposes. As such, we do not allow clients to perform their own audits as allowing this practice would create a burdensome and unmanageable business practice.  **Question: We do, however, agree to provide audit reports and additional written information as necessary to validate our compliance to a Customer.  Would this be satisfactory?** | **Questions 32 – 38**: The GCC is automatically binding on all government tenders. However it allows for so called Special Conditions of contract which is the agreement that will be negotiated at award stage. This Agreement will set out service specific terms and conditions as well as setting out price, SLA's etc. And the successful bidder will be allowed to vet the agreement whereafter the terms and conditions will be negotiated. the GCCs are included at RFP stage to make bidders aware of the General conditions that is applicable. However bidders will note that it makes provision for so called special conditions of contract which will be drafted separately and negotiated which will be the main terms and conditions applicable to this appointment. Bidders should initial the GCC to acknowledge the terms and conditions that is automatically binding on all government tenders. Bidders can also, as part of their submission, provide its own terms and conditions if it is for instance a subscription license for SARS where SARS reserves the right to review / accept / reject such terms and conditions and enter into negotiations with the Service Provider. |
| 33 | 7.8 Proposed Legal Agreement    The award is conditional on concluding a written agreement with SARS within 21 working days of receiving the agreement, and the terms of the proposal will be incorporated into the final agreement.    Incorporating the proposal terms into the agreement without negotiation will lock us into obligations that will not fully align with our capabilities or risk tolerance. Combined with the strict 21-day timeline, this is insufficient time to address potential discrepancies or refine terms.    **Question: Is it possible to clarify whether key terms in the proposal are open to negotiation, and if so, could we request a more flexible timeline to go through these.** |
| 34 | 7.9 Performance Standards    The RFP requires us to commit to an SLA that has not yet been provided. Stating, failure to adhere to the SLA will result in financial penalties, and repeated breaches will constitute a material breach.    Signing up to an SLA without reviewing its terms creates significant risk, as we cannot assess whether the obligations are realistic or achievable. Financial penalties and the risk of termination for multiple breaches add further uncertainty.    **Question: We need to review the SLA before committing to the terms, is this possible.** |
| 35 | 10. General Conditions of Bidding    By submitting a bid, a bidder is deemed to have accepted all terms and conditions of the RFP and acknowledged that any award will be subject to these terms.    This blanket acceptance of all terms without the opportunity to negotiate or clarify may not align with our operational or legal requirements.    **Question: Is there room to negotiate specific terms post-award.** |
| 36 | 10.7 Indemnity    The RFP imposes uncapped liability on the bidder.    **Question: Would it be possible to negotiate a reasonable cap on liability to ensure that our risk exposure is manageable and proportionate to the value of the contract.** |
| 37 | 10.16 Screening and vetting of a bidder    The successful bidder and its personnel are subject to screening and clearance by the appropriate authorities.    Question: Would it be possible to have clarification on the scope, criteria, and timelines for the screening process as we would need these prior to agreeing. |
| 38 | 10.21. Governing Law  The governing law for any resultant agreement will be South African law.  **Question: Would it be possible to request the possibility of negotiating a neutral governing law in any future agreement.** |
| 39 | Registration  Not submitting the registration will not result in disqualification of the RFP however it is required to be awarded.  **Question: Do we need to register prior to submitting a bid, or can we do this post-award. If we need to register prior before we can bid, can you advise why this is, and what information is required to be submitted in the CSD from the bidders.** | Please see Main RFP document, 7.2.3, Table 4: Prequalification criteria |
| 40 | Hardcopy Submission & Softcopy submission  Hard Copy |  A4 ring bound lever arch file  Soft Copy | USB Key  **Question: Should we agree on all the above points, due to timeline and the fact that we are based in Ireland, would it be possible to submit our bid via email.** | Please refer to the Main RFP document, section 6.4 and 6.5 on submission process. |
| 41 | Can SARS provide some clarity on the annual user numbers please? Is the expectation that you will have 1000 active users per year, equaling 3000 users over three years or is there potential for up to 3000 users each year? | 1000 employees per year and not more than 3000 employees over a 3-year period to access at any time. |
| 42 | Is this letter a mandatory requirement? Normally we would provide copies of our ISO certification and details of our security posture and GDPR compliance. We would suggest that should Udemy Business make the next round then we can invest time and resources into such requirements? | Please see annexure B – Technical Evaluation, section: 3.7 |
| 43 | Can you please provide some clarity on the submission process. We have noted the reference to a e-tendering portal and also to physical and digital submissions. If submission is required via a tendering portal, can you please invite us to participate via this portal? | Please refer to the Main RFP document, section 6.4 and 6.5 on submission process. |
| 44 | Can we sign up to the Government’s Central Supplier Database (CSD) after we have progressed through the RFP stage and have been selected as the vendor of choice? or is it a requirement that we sign up at RFP stage? | Please see Main RFP document, 7.2.3, Table 4: Prequalification criteria |
| 45 | To clarify, if we have a history of doing business in South Africa are we exempt from completing SBD 1? | No. All bidders must complete the SBD 1 |
| 46 | Please confirm that an email submission is an acceptable format for us to submit our response to the SARS RFP.  We note that physical submission is mentioned in this section, but this is not something we typically do. | Please refer to the Main RFP document, section 6.4 and 6.5 on submission process. |
| 47 | We note that in addition to a hard copy submission, SARS required an electronic submission via memory stick. Again, this is not a format we typically submit responses to prospective customers. Is an email submission acceptable to SARS? | Please refer to the Main RFP document, section 6.4 and 6.5 on submission process. |
| 48 | Please provide further clarity on this bidding condition? By responding to this RFP are we 'accepting' the General Condition of Contract document (referenced in our next question below)? | Please refer to response given on question 32 - 38 |
| 49 | Can SARS please advise if this document has been provided as an FYI at RFP stage and will be discussed in more detail with the successful bidder?  Is there any expectation at RFP stage for potential providers to review this document in full? Or to provide any response to it at RFP stage? This is not something that we would typically do at RFP stage. | Please refer to response given on question 32 - 38 |
| 50 | We do not provide contact details for our current customers in an initial response to RFPs. We can provide relevant case studies at RFP stage and we can then provide specific contact details for customers once we have been down-selected as the vendor of choice. | Please refer to Annexure B – Technical evaluation on how this criteria will be evaluated. |
| 51 | Has this document been provided as an FYI to bidders? Our understanding is that we do not need to respond within this document, but rather, we need to ensure that all topics are covered in our technical proposal response to SARS - please confirm we are interpreting this correctly? | If the document in question is the technical evaluation criteria, Yes, it is provided as Annexure B. Service Providers do not need to submit their technical proposal within this document. |
| 52 | Would SARS accept a copy of the proposed team's LinkedIn profile/Resume rather than completing Annexure C for each team member? Some of the requested information is not something we would typically provide due to GDPR etc. | Please refer to Annexure B – Technical evaluation on how this criteria will be evaluated. |
| 53 | Udemy Business is costed in USD. However, if this is a barrier to business we can rely on our partner network who can resell in ZAR. | Please refer to: Annexure E – Pricing Template. |
| 54 | **Question:** Could you please provide approximate percentages for the SARS employees participating in this training who:   * Only require fundamental skills development in Data and AI? * Require fundamental skills development in Data and AI, followed by deeper skilling for data analysis? * Need to develop the deep skills necessary to become junior data scientists within the 12-month period? | 1. Skill Levels: - We cannot provide an exact breakdown of the courses required at each level, the training platform must offer a full suite of courses, ranging from basic to advanced levels. - Some employees are already at an advanced level, but the training should address any skill gaps and ensure all employees have access to relevant content for reference. - The platform should be agile enough to adapt to new technologies as they emerge, ensuring employees have access to the latest skills and knowledge on demand.  2. Skill Development Percentages: - The platform should cater to employees at different skill levels: - Fundamental skills development in Data and AI (for beginners). - Deeper skilling for data analysis (for intermediate learners). - Advanced training to become junior data scientists within a 12-month period (for advanced learners). - Exact percentages for each group are not available at this stage, but the platform must be flexible enough to accommodate all three categories. |
| **General and Important** | | |
| 22. | Bidders must carefully read the RFP document and its annexures. | |
| 23. | Bidders are advised to regularly visit the SARS website for any updates. | |