RFP 24/2024

RFP 24 /2024: APPOINTMENT OF ADVISORY FIRM FOR PROVISION OF CASE MANAGEMENT MODERNISATION PLANNING FOR A PERIOD OF EIGHT MONTHS

Non - Compulsory Briefing Session Question & Answers

Last updated: 03/12/2024

#	Question	Answer
	Questions during the Briefing Session	
1	The Mint Group has addressed a number of similar engagements across the South African and Middle Eastern landscape, but just want to confirm if participating and hopefully landing this initial planning engagement with SARS would exclude the organisation from the subsequent implementation RFP, which we assume would follow upon the completion of the delivery of this RFP? We could not find any such clause in the RFP request for the planning phase but felt it would be better to confirm upfront.	Point 3.4 of the RFP indicates the following: Bidders to note that the parties awarded during this RFP process are restricted from bidding and providing goods, works and services to any eventual project that may result, directly or indirectly from the goods and services requested in this RFP. This is in line with National Treasury Practise Note SCM 3 of 2003.
2	Could you please confirm if applying for this RFP **(RFP24/2024)** would exclude us from applying to do the implementation work of the design and advisory? Additionally, will the implementation work be offered through future RFPs? We aim to monitor the "Published Tenders" page on your website to watch for the future RFPs, if there is a way to register our interest for the implementation work, please can you advise.	The first part of your question is addressed in the above response. If there is implementation work, it will be advertised in SARS website and National Treasury e-tender portal.

	We are eager to collaborate with you and would appreciate your confirmation of the above questions.	
3	Does the scope include Tax and Customs? If yes, is SARS able to advice the weightage in terms of Case Management amongst Tax and Customs domains?	Yes, both Tax and Customs (which includes Excise) are included. The weightage between Tax and Customs is approximately 2:1. Both Tax and Customs include similar back-end capabilities but Tax includes supports more revenue types than does Customs.
4	Where exactly in the SARS Value chain is Case Management involved? Options could be: a. Compliance: Non-filer, Debt management, Audit b. Registration + Compliance: Registrations, Non-filer, Debt Management, Audit c. Registration + Compliance + Workflow: (b) plus Workflow management for all off-lined processing related to tax returns, accounting, compliance	This RFP represents option (c)
5	What is the scope of Modernisation? Is this ONLY for Case Management? Or, is the Service Provider expected to provide the roadmap for all SARS applications with focus on Case Management?	The scope extends to all SARS applications that are related to Case Management, as per the response to question 2. above
6	How is Workflow management implemented in SARS currently?	Workflow management is provided by a bespoke solution
7	What is the tech stack used specifically for Case Management?	Refer to the 'Tech stack' worksheet. The application portfolio for Case Management is almost entirely bespoke solutions.
8	For the "Intelligent tax administration platform", is SARS considering to implement OECD's Tax 3.0 vision?	SARS takes guidance from the OECD's Tax 3.0 vision in the design of the intelligent tax administration platform, although some capabilities of that platform may be added to the scope of Tax 3.0.
9	What is the Cloud footprint for SARS at this stage? Is it envisioned that the Case Management system to be a Cloud solution?	The vast majority of SARS's Case Management capabilities are currently provided by technology components that are hosted in SARS's on-premise data centres. A small number of newer capabilities are provided by Cloud SaaS solutions.

10	For Workstreams 3 and 4, SARS has requested to include 2 CVs each. Can SARS confirm whether only these 4 x resources would be responsible for services mentioned in Table 8H?	The Service Provider may include additional resources, beyond the 4x resources mentioned, to provide the services mentioned in the RFP.
11	Section 4.1.5.1 asks for 3 x signed reference letters on client's letterhead. We will attempt our best to submit them. However, due to tight timelines, would submitting the credential with the client contact details (still including description, duration and date completed) be considered?	Yes, this is one of the requirements of the technical evaluation criterion.
12	Is the expectation for the Service Provider to advise/recommend on a Case Management software that would meet the future capabilities as defined in workstream 2?	Yes, that is the expectation.
13	Has work commenced on workstreams 1 and 2? What is the expected duration for workstreams 1 and 2 - do you require all resources from the Service Provider to be on-site or can we provide SMEs for these activities and then bring on the full team when workstreams 3 and 4 commence?	- Work has commenced and is already well advanced on both workstreams 1 and 2, and the final deliverables should be in draft form by when the Service Provider is appointed. SMEs can be provided for the Service Provider's responsibilities for workstream 1 and 2 in advance of the full team for workstreams 3 and 4. - The Service Provider resources may split their time between working on-site at SARS's Brooklyn offices and working remotely. SARS employees work on a hybrid basis, and the Service Provider may want to follow an equivalent engagement approach.
14	In the bid scope document SARS specifies that you require the following two roles: "The successful advisory firm will be required to provide the following technical capable resources: 3.7.1Technology strategist 3.7.2Enterprisearchitect" However, you also detail that for Workstream 1 (requirements gathering) and Workstream 2 (gap analysis) the work will be done by SARS with lighter advisory/consulting SME involvement. But more detailed advisory consulting is required for	The two roles (Tech strategist, enterprise architect) are the minimum resources required to deliver Workstream 3 and 4. The bidders may scope a larger team for those workstreams. For Workstreams 1 and 2, the bidders may use the same team, or a combination of that team and/or other SME resources.

Workstream 3 - evaluating the technology components that make up SARS' case management portfolio - and for Workstream 4 - that focuses on designing an implementation roadmap that balances speed, cost, and risk through a phased approach. Are the two roles specified in the scope document only for scoring purposes? Our assumption is that this scope would require a larger team. Is it SARS' intention that the support for Workstreams 1 and 2, and the delivery of the detail in Workstreams 3 and 4, are only provided by two individuals/roles?	