

# **SARS REQUEST FOR INFORMATION**

**SARS RFI 02/2025**

## **MASTER DATA MANAGEMENT AND DATA GOVERNANCE TOOL**

### **BUSINESS REQUIREMENTS SPECIFICATION**

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## SARS RFI 02/2025

### Business Requirements Specification Master Data Management and Data Governance Tool

This RFI document sets out the business requirements that SARS has for a Master Data Management tool, focusing on Data Governance principles such as Data Quality management, Metadata management, Data Classification, Data Security, and Data Architecture (Data Models).

#### 1. USAGE OF TERMS IN THIS DOCUMENT

##### 1.1 References to Other Documents in the RFI pack

- RFI Main Document

##### 1.2 Glossary Table

The capitalised terms in this document appearing in the glossary table below will have their corresponding meanings. The Vendor/Supplier is referred to the RFI Main Document for the use and meaning of capitalised terms generally in the RFI pack.

Term	Meaning
SP	Service Provider
DG	Data Governance
MDM	Master Data Management
RFI	Request for information
Vendor	Refers to the Original Service Provider or the accredited partner
SARS	South African Revenue Service

## 2. Background

The South African Revenue Service (SARS) is committed to developing a robust data governance program that not only manages its data assets effectively but also ensures compliance with relevant regulatory requirements. The goal is to enhance the strategic utilisation of data for analytics, artificial intelligence (AI), and to improve operational efficiency. To this end, this Request for Information (RFI) is being issued to collect comprehensive insights from vendors who offer data governance and master data management solutions that align with these objectives. The objective is to understand the capabilities and offerings of potential partners that can assist in achieving these critical objectives.

SARS strive to tackle issues such as data silos, inconsistent data quality, regulatory complexities, and the requirement for real-time governance in a multi-platform environment. It is essential for vendors to illustrate how their solutions can seamlessly integrate with legacy technologies such as Mainframe and advanced technologies, including AI-driven analytics etc.

This RFI seeks to gather crucial information from potential suppliers regarding data governance tool for master data management. The information collected will be instrumental in informing SARS' decision-making process for the upcoming data governance tool procurement process.

## 3. Minimum Technical Requirements:

SARS seek a comprehensive data governance solution that addresses the following areas, with an emphasis on flexibility, automation, and alignment with industry best practices:

- Centralised Data Cataloguing and Metadata Management
  - Automated Metadata Discovery
  - Data Glossary
- Unified Access
- Enhanced Data Governance
- Scalability
- User-Friendly Interface

- Data Lineage and Impact Analysis
- Data Quality Management
- Management of Data Privacy and Security
  - Apply Data masking techniques.
  - Implement end-to-end encryption.
  - Adhere to data protection regulations such as POPIA.
  - Maintain a clear record of user roles and access permissions,
  - Keep a comprehensive audit trail.
  - Apply detailed access policies utilising Role-Based Access Control (RBAC) and Attribute-Based Access Control (ABAC) models.
- Policy and Compliance Management
- Workflow and Collaboration
- Reporting and Monitoring Capabilities
- Version Control and Change Management
- Data Governance Integration Capabilities
  - Integration with all existing information systems and workflows across various processes,
  - Solution with a capability to integrate with mainframe Adabas,
  - Compatible configuration with existing business processes.
  - Integration for both Cloud and On-Premises environments,
  - Adapt to the evolving landscape of data management, accommodating new technologies and methodologies as they emerge.
- Real-Time Data Governance
  - Should provide real-time notifications that alert users to any violations of established data policies or concerns related to data quality.

#### 4. RFI Response Requirements

To facilitate efficient gathering of information on master data management (MDM) tools, SARS requires detailed and comprehensive responses from service providers.

#### 4.1. Vendor's Information

- Provide your company's name, headquarters location, and years in business.
- Describe your experience in providing data governance solutions, including the number of clients served and industries supported.

### 5. Solution Overview

- Provide a high-level description of your data governance solution or service, including its core components and delivery model (e.g., software, cloud-based etc.).
- Is your solution a standalone product, part of a broader platform, or a custom-built service?
- Describe how your solution aligns with industry-standard data governance frameworks (e.g., DAMA-DMBOK, COBIT).
- Highlight any unique features or differentiators of your solution.
- Provide a product roadmap, including planned enhancements or updates over the next 1–3 years.
- Provide a 3-year product roadmap, detailing:
  - Planned features (e.g., blockchain for data provenance).
  - Strategies to address emerging regulations or technologies.

### 6. Functional Requirements

- Describe how your solution addresses the following functional requirements. Include specific features, tools, or processes.

#### 6.1. Data Governance Framework:

- How do you support the creation and enforcement of data governance policies and standards?
- Can you provide templates or pre-built frameworks for data governance?

## 6.2. Data Quality:

- What tools or processes ensure data accuracy, completeness, consistency, and timeliness?
- Does the tool have the capability to identify inconsistencies in data across different databases or systems, and can it create real-time alerts for any discrepancies detected?
- Do you offer data profiling, cleansing, or enrichment capabilities?
- Does the system have the capability to implement validation rules, checks, and standards to verify that data meets predefined quality requirements?
- Does the tool provide reporting and dashboards that offer visualisations and reports on data quality status and trends?
- Can the tool perform data matching to identify and merge records that belong together, especially when sourced from multiple data systems?
- Are there automated data quality checks in place to identify and flag potential data issues automatically?
- Does the tool support workflow management for automating data quality processes and tasks? Automated data validation coupled with data cleansing and enrichment processes.
- Does the tool support data quality monitoring and built-in system audit for proactive quality management?
- Does the tool provide functionalities to support No-Code or Low-Code Configurations.

## 6.3. Metadata and Data Model Management:

- How do you automatically enable metadata and data model scanning, cataloguing, classification and discovery?
- Do you support automated metadata and data model extraction and integration with data catalogues?
- Do you offer a central master data dictionary/glossary and if yes please explain what it entails and the access/retrieval functionality.
- How do you track and integrate the metadata and data models end-to-end? I.e. from the source systems to the reporting layer?

- What types of data assets are addressed by your solution?
- Which approach do you follow to ensure a meta driven organisation and please provide a short description of every phase/step.

#### **6.4. Data Lineage and Traceability:**

- How do you track data origins, transformations, and usage across systems?
- Can you provide visual representations of data lineage?
- Does the tool provide impact analysis, i.e. if something were to change from source, what will it affect?

#### **6.5. Access Control and Identity Management:**

- How do you implement role-based access control (RBAC) and user authentication?
- Do you integrate with identity providers (e.g., Active Directory, Okta)?

#### **6.6. Compliance and Auditability:**

- How do you support compliance with regulations such as e.g., POPIA?
- What audit logging and reporting capabilities are available?

#### **6.7. Data Integration and Interoperability:**

- How does your solution integrate with existing systems (e.g., **MAINFRAME**)?
- Do you support common data formats and protocols (e.g., APIs, SQL, JSON)?

#### **6.8. Analytics and Reporting:**

- What dashboards or reports are available to monitor data governance metrics?
- Can users customise reports or set up automated alerts?

#### **6.9. Collaboration and Workflow:**

- How do you facilitate collaboration



among data stewards, owners, and stakeholders?

- Do you offer workflow management for data issue resolution or policy approvals?

## 7. Technical Requirements

### 7.1. Architecture and Deployment:

- Is your solution cloud-based, on-premises, or hybrid? Specify supported cloud providers (e.g., AWS, Azure, Google Cloud).
- Describe the system architecture, including scalability and high-availability features.

### 7.2. Performance:

- What are the performance benchmarks for handling large data volumes (e.g., terabytes, petabytes)?
- How do you ensure low latency for data governance operations?

### 7.3. Security:

- What security measures are in place (e.g., encryption, multi-factor authentication)?
- Do you comply with standards such as ISO 27001, SOC 2, etc.?

### 7.4. Integration:

- What integration methods are supported (e.g., APIs, ETL tools etc.)?
- Can your solution integrate with [e.g., **MAINFRAME, SAP, Microsoft SQL Server, DB2, Microsoft Fabric etc?**

### 7.5. Customisation:

- Can the solution be customised to meet specific organisational needs?
- What is the process and timeline for customisation?

## **7.6. User Interface:**

- Describe the user interface for administrators, data stewards, and end-users.

## **7.7. Maintenance and Upgrades:**

- How frequently are updates or patches released?
- What is the process for applying upgrades without disrupting operations?

# **8. Implementation and Support**

## **8.1. Implementation:**

- Provide a sample implementation timeline for a typical data governance project.
- What resources (e.g., personnel, tools) are required from the client during implementation?
- Do you offer change management or training programs for stakeholders?

## **8.2. Support:**

- What support models are available (e.g., 24/7, business hours)?
- Describe your support channels (e.g., phone, email, ticketing system) and response times.
- Do you provide dedicated account managers or technical support staff?

## **8.3. Training:**

- What training options are available for administrators and end-users?
- Are training materials available online, in-person, or both?

## **8.4. Documentation:**

- What documentation is provided (e.g., user manuals, technical guides)?
- Is documentation updated regularly and accessible online?

## 9. Compliance and Regulatory Support

- How does your solution support compliance with [e.g., POPIA]?
- How do you handle cross-border data transfers and data residency requirements? How does your organization address the legal and compliance aspects of transferring personal or sensitive data across national boundaries and ensuring that data is stored in accordance with local laws?
- Can you provide evidence of compliance with industry standards (e.g., certifications, audit reports)?
- How do you support audit preparation and regulatory reporting?

## 10. Scalability and Futureproofing

- How does your solution scale to accommodate growing data volumes and users?
- Can your solution adapt to emerging technologies, such as AI, machine learning, or blockchain?
- How do you address evolving regulatory requirements?
- What is the lifespan of your solution, and how do you manage end-of-life transitions?

## 11. Cost and Licensing

- Provide an overview of your pricing model (e.g., subscription, perpetual license, usage-based).
- Are there additional costs for implementation, training, or support?
- Do you offer tiered pricing based on features, users, or data volume?
- What is the typical contract duration and renewal process?

## 12. Case Studies and Proof of Concept

- Provide at least two (2) case studies of successful data governance implementations, including client challenges, solutions provided, and outcomes.
- Are you willing to conduct a proof of concept (PoC) or pilot project? If so, describe the process, timeline, and costs.
- Can you provide a demo of your solution? If yes, specify the format (e.g., live, recorded) and availability.

### 13. Additional Information

- Are there any limitations or constraints in your solution that we should be aware of?
- Describe your approach to data sovereignty and handling multi-jurisdictional requirements.
- How do you handle data migration from legacy governance systems?
- Provide any additional information or recommendations that may assist us in our evaluation.

### 14. Evaluation Of the Proposals

- SARS evaluate the technical submission, which would have been submitted by the vendor, based on the BRS and other related information.
- Vendor should have relevant experience in supplying data governance tools for master data management solutions for other organisations and be able to provide references or case studies.
- Following the review of RFI responses, SARS may:
- Invite selected vendors to provide demonstrations or participate in a proof of concept.
- Issue a formal RFP to shortlisted vendors.