

SOUTH AFRICAN REVENUE SERVICE

REQUEST FOR PROPOSAL

RFP 35/2025

**APPOINTMENT OF A SERVICE PROVIDER TO
CONDUCT AND PROVIDE COMPENSATION AND
BENEFIT SURVEYS**

MAIN RFP DOCUMENT

**INSTRUCTIONS, GUIDELINES, AND CONDITIONS OF
TENDER**

TABLE OF CONTENTS

1.	PURPOSE OF THIS REQUEST FOR PROPOSAL	3
2.	OVERVIEW OF SARS' REQUIREMENTS	3
3.	STRUCTURE OF THE RFP PACK.....	3
4.	KEY ACTIVITIES AND DATES	4
5.	COMMUNICATION	6
6.	TENDER PREPARATION AND SUBMISSION	6
7.	EVALUATION OF PROPOSALS	9
8.	TRUSTS, JOINT VENTURES, SUBCONTRACTING AND OTHER ARRANGEMENTS	32
9.	COMPLAINTS AND ALLEGATIONS	33
10.	GENERAL CONDITIONS OF BIDDING	34
11.	CHECKLIST OF RETURNABLES	42

REQUEST FOR PROPOSAL

Summary, Guidelines, Conditions and Instructions

1. PURPOSE OF THIS REQUEST FOR PROPOSAL

The purpose of this Request for Proposal (RFP) is for the South African Revenue Service (SARS) to invite suitably qualified service providers (bidders) to submit proposals (tenders) in accordance with the rules set out in this RFP for the appointment of a service provider to conduct and provide compensation and benefit surveys.

2. OVERVIEW OF SARS' REQUIREMENTS

2.1 SUMMARY OF THE SCOPE

The scope of work and the required services are detailed in the Business Requirements Specification (BRS) document that form an integral part of RFP 35/2025. Refer to Annexure A.

2.2 BACKGROUND

The SARS Remuneration Policy reflects SARS' commitment to offering market-related salaries, recognising the competitive nature of acquiring talent within the national labour market. SARS pay band development and employee benefits offering is influenced by the national benchmarks to ensure competitiveness. SARS therefore needs to participate in the following reputable surveys with jobs that cover most of SARS internal jobs:

- National Salary survey
- Benefits survey
- Short-Term Incentive (STI) survey
- Salary and Wage movement survey

The successful bidder will be required to demonstrate expertise in conducting salary surveys, with a proven track record of delivering comprehensive and actionable insights. Key deliverables include a detailed report outlining salary ranges for jobs and grades, wage movement, and benefits analysis. The survey should also consider factors such as geographic location, industry standards, and organisational size to ensure relevance and accuracy.

3. STRUCTURE OF THE RFP PACK

3.1 STRUCTURE

This RFP pack is organised in 5 (five) sections consisting of one or more documents in each section.

Table 1: RFP pack outline and contents

Section	Index	Description of section contents
1	Main RFP Document	Documents detailing the main RFP guidelines, instructions, conditions and documents necessary for a bidder to submit a proposal.
2	Business Requirements Specification	Document(s) outlining the business requirements specifications, mandatory requirements and other information required by a bidder to submit a proposal.
3	SBD Documents	Standard Bid Documents (SBDs) and other administrative documents that are required by National Treasury and SARS Procurement to be read, completed, and returned as part of a bidder's proposal.
4	Contract management	The General Conditions of Contract (GCC) and proposed Services Agreement under which SARS wishes to contract the services.
5	Response templates	Where applicable, response templates that are required to be completed and returned as part of a bidder's proposal.

4. KEY ACTIVITIES AND DATES

The table below lists certain key dates and activities relevant from the time of issue of the RFP up to and until the closing date:

Table 2: Key activities and dates

No.	Activity	Date / Time / Details
1.	Bid Number:	RFP 35/2025
2.	Description:	Appointment of a service provider to conduct and provide compensation and benefit surveys.
3.	Duration of contract:	The successful bidder will be appointed for a period of sixty (60) months , subject to SARS's terms and conditions
4.	Validity period of proposals:	Bids submitted will be valid for a period of 180 calendar days from closing date. SARS may however, subject to the bidders' consent, extend the validity period prior to expiry thereof.

No.	Activity	Date / Time / Details
5.	Advertisement of the RFP:	a) National Treasury e-Tender Portal: 31 October 2025 b) SARS website: 31 October 2025
6.	RFP pack (complete set of bid documents) available for download from National Treasury e-Tender Portal and SARS website:	31 October 2025
7.	Virtual briefing session date and registration:	A non- compulsory briefing session will be held on 6 November 2025 at 14:30 virtually via Microsoft Teams meeting and can be accessed at the following link: Join the meeting now Meeting ID: 382 210 511 199 5 Passcode: nN2iz6oX
8.	Bidders to submit written questions only during this period:	31 October 2025 – 12 November 2025
9.	SARS to respond to bidders' written questions on or before:	17 November 2025
10.	CLOSING DATE AND TIME (proposals due):	2 December 2025 at 11:00 South African time

All dates and times in this RFP are South African Standard Time. The establishment of a time or date in this RFP does not create an obligation on the part of SARS to take any action or create any right or expectation in any way for any bidder to demand that any action be taken on the date established, or on any other date. A bidder accepts that if SARS extends the deadline (closing date) for proposal submissions for any reason whatsoever, the requirements of this RFP will apply equally to the extended deadline.

5. COMMUNICATION

All communication to SARS must be addressed to the SARS Tender Office, through this email address tenderoffice@sars.gov.za, and must contain a clear reference to this RFP. Correspondence sent by SARS must only be regarded as official communication if sent from tenderoffice@sars.gov.za, or accompanied by a letter of authorisation signed by the SARS Procurement Executive.

A bidder may only correspond with SARS regarding this RFP through the official contact provided in this document. SARS may, at its sole discretion, disqualify a bidder if the bidder communicates or attempts to communicate any information regarding this RFP to any of SARS's employees; officials; or any third parties involved in the preparation, evaluation, or award of the RFP other than through the official contact provided.

6. TENDER PREPARATION AND SUBMISSION

6.1 INTRODUCTION

SARS has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under section 76 of the Public Finance Management Act, 1999 (Act No. 1 of 1999), which prescribes that SARS' procurement processes be:

- economical, efficient, fair, equitable, transparent, competitive and cost effective; and
- consistent with the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000), its Regulations, and the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003).

6.2 QUESTION AND ANSWER PROCESS

A bidder may submit questions to SARS as part of the question-and-answer process to gain full understanding of any aspect of the RFP that is not clear to the bidder, during the stipulated period.

On the dates provided in paragraph 4, SARS will receive written questions by bidders through the official contact provided in this document. SARS will respond to these questions, however, is not obliged to respond to a question which in SARS's opinion is inappropriate and does not reasonably warrant an answer. The questions and answers will be published on the National Treasury e-Tender Portal and the SARS website. The identity of a bidder who has directed a question to SARS will not be disclosed by SARS in such responses.

SARS may issue updated versions of documents issued in the RFP pack and/or may issue additional documentation to form part of the RFP pack. Such re-issued or additional documentation will be published on the National Treasury e-Tender Portal and SARS website. It is the bidder's responsibility to visit the National Treasury e-Tender Portal and SARS website at regular intervals to ensure that a bidder uses the latest versions of documents in the RFP pack.

The National Treasury e-Tender Portal must be treated as the primary means of communication. In the event of any other communication that conflicts with communications posted on the National Treasury e-Tender Portal, the National Treasury e-Tender Portal communication will prevail.

6.3 CENTRAL SUPPLIER DATABASE

All bidders wishing to do business with SARS must register on the Government's Central Supplier Database (CSD) at www.CSD.gov.za, and to include in their submission their CSD Master Registration Number. The recommended bidder(s) must be registered on the CSD prior to an award letter / purchase order / signed contract being issued.

Foreign suppliers with neither South African tax obligations nor history of doing business in South Africa must complete the questionnaire on the Standard Bidding Document (SBD) 1.

6.4 PROPOSAL SUBMISSION

For this RFP, SARS will accept proposal submissions in the form of physical proposal submissions, either deposited in the SARS tender box or posted to the SARS Tender Office.

The physical proposal submissions must be deposited before the closing date and time, in the SARS tender box , situated at the main entrance at the following address:

Procurement Tender Office,
Lehae La SARS,
299 Bronkhorst Street, Nieuw Muckleneuk, Brooklyn, Pretoria, 0181.

- 6.4.1 The proposals may also be couriered to the address provided in the afore-mentioned paragraph.
- 6.4.2 Proposals will only be considered if received by the SARS Tender Office before the closing date and time, regardless of the method used.
- 6.4.3 Late proposals will not be accepted.
- 6.4.4 The onus is on the bidder to ensure that its proposal submission and documentation received by SARS in this bid are submitted timeously and are accurate and complete. Failure by any bidder to discharge this onus will result in proposal submissions being disqualified for consideration.

6.5 INSTRUCTION FOR SUBMITTING A PROPOSAL

This section details the instructions to bidders for preparing a proposal in response to this RFP, which must be followed in detail to enable the information contained in a bidder's proposal to be read, understood and evaluated in a common and consistent layout, and to ensure that the information submitted is correct, complete and well structured. Should a proposal be received that is not in the correct format, SARS reserves the right to disqualify the entire proposal or portions of the proposal depending on the extent of the deviation from the format described in this document.

All proposals and supporting documentation must be submitted in English.

A bidder's proposal is required to be submitted in two forms:

Hardcopy submission	<p>One (1) hardcopy submission clearly marked.</p> <p>A "hardcopy submission" means an A4 ring bound lever arch file.</p>
Electronic submission	<p>One (1) electronic submission of a complete copy of the hardcopy submission.</p> <p>An "electronic submission" means a memory stick (USB stick) containing a complete copy of the hardcopy submission. The onus is on the bidder to ensure that the electronic submission submitted is a complete copy of the hardcopy submission.</p>

- 6.5.1 The hardcopy and electronic submission must be marked and labelled correctly, and must be outer sealed, wrapped and packaged, for ease of reference during the evaluation process.
- 6.5.2 Technical and Pricing information must be included in separate folders. The Technical information must be included in “Folder 1”, and the Pricing information must be included in “Folder 2”.
- 6.5.3 A bidder is required to submit the contents of its submission (hardcopy and electronic) in the following format:

Table 3: Format and organisation of proposal

Files		Section	Responses
Folder 1: Technical Proposal	<ul style="list-style-type: none"> • RFP reference • Description • Bidder name 	1	<ul style="list-style-type: none"> • Prequalification documents (SBD and other documents), excluding SBD 6.1 Preference point claim form.
		2	<ul style="list-style-type: none"> • Supporting documents to be provided for all requirements as well as completed Annexure B
		3	<ul style="list-style-type: none"> • Company Profile • Supplementary information
		4	<ul style="list-style-type: none"> • Draft Services Agreement
Folder 2: B- BBEE/ specific goals proposal. Pricing and Financial Analysis	<ul style="list-style-type: none"> • RFP reference • Description 	1	<ul style="list-style-type: none"> • B-BBEE certificate or Sworn Affidavit • SBD 6.1 Preference point claim form
		2	<ul style="list-style-type: none"> • Pricing response template
		3	<ul style="list-style-type: none"> • A complete set of three (3) most recent years annual financial statements as detailed in this RFP.

7. EVALUATION OF PROPOSALS

7.1 PROCESS AFTER THE CLOSING DATE

After the closing date and time SARS, will evaluate the proposals with reference to SARS' evaluation criteria. SARS reserves the right to employ subject matter experts to assist in performing such evaluations.

7.2 PREQUALIFICATION EVALUATION PROCESS (GATE 0)

SARS has defined minimum administrative prequalification criteria that must be met by a bidder. The table below contains the administrative prequalification documents that are required as part

of a bidder's proposal, which must be completed and signed by the duly authorised representative of the prospective bidder(s).

Where a bidder's proposal fails to comply fully with any of the prequalification criteria, SARS may at its discretion allow the bidder an opportunity to submit and/or supplement the information and/or documentation provided within a grace period of seven (7) working days or such alternative period as SARS may determine to achieve full compliance with these criteria before disqualifying the bidder.

SARS will disqualify a bidder who does not achieve full compliance of the prequalification Standard Bidding Documents (SBD) after the grace period provided by SARS.

Table 4: Prequalification criteria

#	Prequalification documents to be submitted	Instructions	Non-submission will result in disqualification?
1.	SBD 1: Invitation to bid form	Bidder to complete and sign the supplied pro forma document.	YES
2.	SBD 4: Bidder's Disclosure	Bidder to complete and sign the supplied pro forma document.	YES
3.	SBD 6.1: Preference point claim form	Bidder to complete and sign the supplied pro forma document, to claim the point for B-BBEE / specific goals.	NO Non-submission will lead to a zero score on B-BBEE / specific goals.
4.	Supplier Risk Questionnaire	Bidder to complete and sign the supplied pro forma document.	NO
5.	Proof of registration on the Central Supplier Database (CSD)	Bidder to submit the proof of registration on CSD.	NO However, a bidder must be registered on CSD in order to be considered for award.
6.	Draft Agreement with comments on track changes	Bidder to sign the supplied pro forma document. Bidder to indicate their acceptance	NO The GCC should be initialized and signed and

#	Prequalification documents to be submitted	Instructions	Non-submission will result in disqualification?
	and General Conditions of Contract (GCC)	of the terms and conditions set out in the draft Agreement in their bid proposal covering letter.	The recommended bidder(s) will be required to sign the applicable Services Level Agreement on award.
7.	A complete set of three (3) most recent years annual financial statements	Submit complete sets of three (3) most recent years annual financial statements in accordance with the requirements of the Financial Risk Analysis paragraph as detailed in this RFP.	NO

7.3 TECHNICAL EVALUATION PROCESS (GATE 1)

Only bidder(s) that have met the Pre-Qualification Criteria in Gate 0 will be evaluated in Gate 1 for functionality/ technical criteria. Note that this document aids as a guideline on the points to be scored for these elements, and this document is **ONLY** to be scored by the SARS Technical Evaluators based on the extensive information provided in the proposal submission. A bidder is required to provide a technical solution for the required goods and services that meet SARS' requirements, and that is financially competitive and offers value for money.

Functionality will be evaluated as follows:

- Desktop Technical Evaluation – All bidders will be evaluated out of 72 points during Desktop Evaluations.
- Presentation Evaluation – All bidders will be invited for presentations which will be evaluated out of 28 points.

Only Bidders that have obtained a minimum threshold of 75 out of 100 points will proceed to Gate 2: Price and B-BBBEE evaluations.

Bidders to provide comprehensive proposal as supporting documents in line with the technical evaluation criteria addressing the requirements outlined below:

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
1	Company Profile, Experience and Resource		10.00	
1.1	<p>a) Bidder must provide a company profile indicating minimum of fifteen (15) years of experience in providing salary survey services which includes:</p> <p>i) National market Salary Survey; ii) Salary & Wage movement survey; iii) Short Term Incentives (STI) survey; and iv) Benefits survey</p>	<ul style="list-style-type: none"> • Bidder has fifteen (15) or more years of experience in providing all 4 required surveys = 6 • No information provided / Bidder has fifteen (15) years' experience but does not provide all 4 required surveys/ Bidders has less than fifteen (15) years' experience & provide all 4 required surveys = 0 	6.00	
1.2	<p>b) Full details of a dedicated Account Manager who will attend regular supplier review meetings between the bidder and SARS. The bidder must provide a Curriculum Vitae (CV) of the Account Manager which includes but is not limited to:</p> <ul style="list-style-type: none"> • Names and contact details (includes full names, email and telephone numbers) • Minimum of seven (7) years of experience as an Account Manager servicing several companies on 	<p>Contact details</p> <ul style="list-style-type: none"> • Bidder has provided Account Manager's full contact details (includes full names, email and telephone numbers) = 1 • Information not provided / information not fully provided = 0 <p>Experience</p> <ul style="list-style-type: none"> • Minimum of seven (7) years of experience as an Account Manager servicing several companies on similar projects with an average of five thousand (5000) employees = 2 	4.00	

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
	<p>similar projects with an average of five thousand (5000) employees; and</p> <ul style="list-style-type: none"> Detailed and substantiated experience of being an account manager in the salary survey industry by providing details of three (3) similar projects managed. 	<ul style="list-style-type: none"> Less than 7 years' experience/ companies less than an average of 5000 employees/ information not provided = 0 <p>Details of experience</p> <ul style="list-style-type: none"> Detailed and substantiated experience of being an account manager in the salary survey industry by providing details of three (3) similar projects managed = 1 Detailed and substantiated experience of being an account manager in the salary survey industry by providing details of two (2) similar projects managed = 0.5 Less than two (2) similar projects/ Project is not similar or aligned to SARS requirements/ information not provided = 0 		
2	National Salary survey		41.00	
2.1	Job matching support			
	The bidder must demonstrate the ability to provide job matching facilitation and support as part of the service offering and provide the number of hours.	<ul style="list-style-type: none"> Bidder provides details of how the bidder conducts job matching facilitation and support = 2 No information provided/ Bidder does not conduct job matching facilitation = 0 	2.00	

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
2.2	Validation of data.			
	<p>Bidder must describe the method applied in the validation of data against SARS policy which include but is not limited to:</p> <ul style="list-style-type: none"> • Automated Data Checks • Consistency Checks • Benchmark Comparison • Human Review • Statistical Validation • Job Matching Validation • Participant Confirmation 	<ul style="list-style-type: none"> • Bidder validates data against SARS policies. The validation must include but not limited to Automated Data Checks, Consistency Checks, Benchmark Comparison, Human Review, Statistical Validation, Job Matching Validation, Participant Confirmation = 6 • Information not provided / not validated against SARS policies and job matching / insufficient proof of data validation = 0 	6.00	
2.3	Salary Survey Library		6.00	
	<p>Bidders must include a comprehensive survey job library in a "spreadsheet" format, providing survey job information. The "spreadsheet" must be in a format that enables data filtering and sorting, and provide the following fields:</p> <p>Note: The spreadsheet must be submitted in the USB</p>			

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
	i) Comprehensive survey job/job titles library – provide a spreadsheet of the survey job information and indicate the number of jobs in the library.	<p>Bidders spreadsheet <u>MUST</u> be in column format and able to sort, if not, bidder will score 0.</p> <p>Number of survey jobs/job titles in the library representing the National market with representation of the Financial and Information Technology sector.</p> <ul style="list-style-type: none"> • 1650+ = 3 • 1200 - 1649 = 2 • 1000 - 1199 = 1 • < 1000 = 0 	3.00	
	ii) Industry / type of Business i.e. Retail, Finance, etc.	<ul style="list-style-type: none"> • Bidders spreadsheet <u>MUST</u> have columns from ii) - viii) = 3 • No information submitted/ Any missing information = 0 	3.00	
	iii) Grading of the job (i.e. can indicate according to any of the official grading methodologies - must provide a separate correlation table)			
	iv) Survey / Job code			
	v) Job Title (Possible alternative title, if applicable)			
	vi) Job description			
	vii) Qualification and years of experience needed to perform this job, etc			
2.4	Salary Survey - Uploading of data		16.00	

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
	<p>a) Bidders must indicate how often the data is uploaded on the Bidders' survey data system and indicate whether:</p> <ul style="list-style-type: none"> • the data is current – upload as and when company salary increases happen or • the data is “static” – once a year data collection and report. 	<p>Bidder has indicated that the data is uploaded:</p> <ul style="list-style-type: none"> • As and when company Salary information changes (real time) = 11 • Once a year = 5 • No information provided = 0 	11.00	
	<p>b) Bidders must indicate whether all grades/all employment categories (Paterson A1 to Paterson F5) are covered in one report survey i.e. National survey. If surveys are conducted / split into different surveys based on level, indicate how levels are reported on i.e. Executive, Management, General Staff. Also indicate the typical survey collection and report dates for these surveys.</p>	<ul style="list-style-type: none"> • All Grades/ employment categories (Paterson A1 to Paterson F5) are covered in one report survey i.e. National survey = 5 • If not all grades/ employment categories (Paterson A1 to Paterson F5) are covered in one survey report, indicate how levels are reported on i.e. Executive, Management, General Staff, when survey data is collected and when report is made available = 3 • No information provided or any of Executive, Management, General Staff is not reported on= 0 	5.00	

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
2.5	Salary Survey - report		11.00	
	a) Bidder must indicate the size of the database that informs the report. The database must have at least one (1) million data points	<ul style="list-style-type: none"> • Bidder has indicated the size of the database that informs the report. The data points of participating companies have at least one (1) million data points = 3 • Data points of participating companies are less than one (1) million data points/ No information provided = 0 	3.00	
	b) Bidder must indicate the number of participating companies that represents the data as represented in the National Salary survey report. Bidders must have at least 50 companies.	<ul style="list-style-type: none"> • Bidder has indicated the size number of companies that submitted data and who's data informs the report with at least 50 companies = 3 • Less than 50 companies participated, or No information provided = 0 	3.00	
	c) Bidders must provide a list of the participants who provided data for this report in the last 12 months - the list must represent the National market, as well as representation of the following Sectors: <ul style="list-style-type: none"> • Financial • Information Technology • State Owned Enterprises 	<ul style="list-style-type: none"> • Bidder has provided a list of participants as per the sectors indicated = 3 • No list of participants provided as per the sectors indicated / or if any one of the three (3) sectors is not represented = 0 	3.00	

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
	d) Bidders must indicate how often and in which months the report(s) are available (if the survey is split per employment category with different surveys for different employment categories, it must be indicated)	<ul style="list-style-type: none"> • At least every year for all employment categories (even though it might be different surveys / different report date) = 2 • with intervals more than one year / No information provided = 0 	2.00	
3	Salary and Wage movement survey		3.00	
3.1	a) Bidders must provide a list of all the current salary and wage movement survey participants, including the company name, the industry they represent and indicate whether the company is Public, Private or Parastatal.	<ul style="list-style-type: none"> • List of current participants in the national market with representation of the Financial and Information Technology sector covering Public, Private or Parastatal = 2 • List provided is not relevant (i.e. if national market is not represented)/ No information provided = 0 	2.00	
	b) Bidders must indicate how often and in which months the report is available.	<ul style="list-style-type: none"> • At least every year = 1 • with intervals more than one year / No information provided = 0 	1.00	
4	STI survey		2.00	
4.1	Bidders must:			
	a) Provide an extract of STI survey report, illustrating the format and content of such a report. The report	<ul style="list-style-type: none"> • Must provide extract of the STI report with relevant information covering eligibility criteria, grade, percentage; 	1.00	

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
	must cover eligibility criteria, grade, percentage; base for calculation; pay mix; industry and region.	base for calculation; pay mix; industry and region = 1 No information provided = 0		
	b) Indicate how often this survey is conducted, and the input and report month.	<ul style="list-style-type: none"> Survey is conducted at least every 2 years = 1 No information provided/ period is longer than 2 years = 0 	1.00	
5	Benefits survey		7.00	
5.1	Bidders must provide:			
	a) A list of all the current benefits survey participants with representation of national market in the Financial and Information Technology sector;	<ul style="list-style-type: none"> A list of current relevant participants i.e. if the National market with representation of the Financial and Information Technology sector is represented = 2 No information provided / List provided is not relevant (i.e. if national market is not represented) = 0 	2.00	
	b) A list of all the benefits surveyed i.e. BCEA benefits and other Employee Value Proposition (EVP) benefits;	<ul style="list-style-type: none"> if BCEA and other EVP benefits are surveyed = 3 if only BCEA benefits are surveyed = 1 No information provided/ BCEA and EVP are not surveyed = 0 	3.00	

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
	c) Indicate how often the survey is conducted;	<ul style="list-style-type: none"> • if surveyed every 2 years = 1 • if surveyed every 3 years = 0.5 • No information provided/ more than 3 years = 0 	1.00	
	d) An extract of the benefits survey report, to illustrate the format and content/analysis of the report to the participant.	<ul style="list-style-type: none"> • Benefit survey must have an analytical content = 1 • No information provided = 0 	1.00	
6	Testimonials		9.00	
6.1	<p>Bidders are required to submit testimonials from only three (3) clients where similar services were provided. The testimonial must be provided by a current client receiving services from the bidder, or from a client who received services within the past 12 months. Refer to Annexure B which must be completed by the Bidder's Clients. Each testimonial must include but not be limited to:</p> <ul style="list-style-type: none"> • Client name; • Contact person, phone number, email address, company business address; • A brief description of the full services rendered 	<p>Bidders are required to submit testimonials from <u>only three (3)</u> clients where similar services were provided. The testimonial must be provided by a current client receiving services from the bidder, or from a client who received services within the past 12 months. Refer to Annexure B which must be completed by the Bidder's Clients. Each testimonial must include but not be limited to:</p> <ul style="list-style-type: none"> • Client name; • Contact person, phone number, company business address; • A brief description of full services rendered; <p>NB:</p>		

No.	Technical Evaluation Criterion	Model Answer	Weight	Bidder to reference where in the proposal submission this is substantiated (page and paragraph).
	<ul style="list-style-type: none"> Company size: Number of employees; Quality of service; Quality of reports; <p>Notes:</p> <ul style="list-style-type: none"> Annexure B may be copied to the client's company letterhead or authenticated with a company stamp. It is important to keep SARS format of questionnaire. 	<ul style="list-style-type: none"> If description of the service rendered is not aligned to the SARS required services, bidder will get 0 points for the specific testimonial. Bidder will get maximum of 3 points per relevant testimonial 		
		<p>Company size: Number of employees;</p> <ul style="list-style-type: none"> More than 5000 = 1 point per testimonial 5000 - 3000 = 0.5 point per testimonial No information provided / Below 3000 = 0 	3.00	
	<ul style="list-style-type: none"> SARS reserves the right to contact the clients for a reference check. It is important to ensure that the clients are contactable. 	<p>Quality of service rendered is</p> <ul style="list-style-type: none"> Good = 1 point per testimonial Average = 0.5 point per testimonial No information provided / Poor = 0 	3.00	
		<p>Quality of reports provided</p> <ul style="list-style-type: none"> Good = 1 point per testimonial Average = 0.5 point per testimonial No information provided / Poor = 0 	3.00	
Total			72.00	

Bidders will be invited to present a demonstration for the Salary Survey Reporting requirements below. Bidder will be required to demonstrate:

Table 5: Presentation Evaluation Scorecard Bidders

No.	Technical Evaluation Criterion	Model Answer	Weight
1	Salary Survey Reporting		28.00
	a) Bidders must present:		
	i) how reports are made available to the survey participant (i.e. excel spreadsheet) or online with option to age and transport to i.e. excel or other document type at any time, and provide examples of all the available reports; If the ageing process is not conducted online, the bidder must illustrate how clients are supported in ageing the data manually or through alternative means, including a practical example of the assistance provided	<p>Report can be accessed:</p> <ul style="list-style-type: none"> • On-line (can run current or age online AND export to i.e. excel) and provide an example of a report = 4. Bidder MUST provide/illustrate report examples - no example = 2 points will be deducted • not on-line but bidder can assist the client with calculation tool/table to age/forecast data and provide an example of a report = 1 if examples not provided, bidder will get 0 • No information provided = 0 	4.00
	ii) Online reporting to segment the data by appropriate Industry Sector and appropriate Job disciplines	<ul style="list-style-type: none"> • Report can be segmented by appropriate Industry Sector and appropriate Job disciplines = 2 • No Segmentation available = 0 	2.00

No.	Technical Evaluation Criterion	Model Answer	Weight
	iii) Online reporting to reflect the Survey Job number, Job Title, Grade, Industry, Discipline etc.	<ul style="list-style-type: none"> Report reflects the Survey Job number, Job Title, Grade, Industry, Discipline etc. = 2 Report does not reflect the Survey Job number, Job Title, Grade, Industry, Discipline / No information provided= 0 	2.00
	iv) Indicate whether the participant can customise and format the reports for internal use by selecting different criteria, sectors, jobs, etc.	<ul style="list-style-type: none"> On-line customisation available and proof of customisation provided =3 No information provided / no proof of customisation provided= 0 	3.00
	iv) Indicate whether the participating company's data is excluded or included in the market data when comparing the company's data to the market	<ul style="list-style-type: none"> If the company's data is excluded when comparing the company's data to the market = 2 If the company's data is included when comparing the company's data to the market = 0 	2.00
	v) Illustrate if the Bidder offers different Industry circles in the reporting. If so, list the Industry Circles/ Sector i.e. Financial Industry, Information Technology, State Owned Enterprises, etc.	<ul style="list-style-type: none"> Yes, and provided a list of the Industry Circles/Sector i.e. Financial Industry, Information Technology, State Owned Enterprises, etc. = 2 No information provided/ industry circle not provided = 0 	2.00
	vi) Indicate whether the participating company can access the report online with Real-time data 24/7/365. If not, indicate the months the survey reports are made available.	<ul style="list-style-type: none"> Yes, the participating company can access the report online with Real-time data 24/7/365 = 6 If not real-time, provide months the survey reports are made available = 3 Information not provided = 0 	6.00
	vi) The content of the salary survey report must include, but not limited to:		

No.	Technical Evaluation Criterion	Model Answer	Weight
	• SARS package component analysis;	• Yes, SARS package component analysis is provided = 1.5 • Information not provided = 0	1.50
	• Market Percentile per job	• Yes, Market Percentile per job is provided = 2 • Information not provided = 0	2.00
	• Data aging analysis	• Yes, Data aging analysis is provided = 1.5 • Information not provided = 0	1.50
	• Geographic Analysis;	• Yes, Geographical analysis is provided = 0.5 • Information not provided = 0	0.50
	• Race analysis;	• Yes, Race analysis is provided = 0.5 • Information not provided = 0	0.50
	• Gender analysis;	• Yes, Gender analysis is provided = 0.5 • Information not provided = 0	0.50
	• Age analysis;	• Yes, Age analysis is provided = 0.5 • Information not provided = 0	0.50

7.4 PRICE AND B-BBEE/SPECIFIC GOALS EVALUATION (GATE 2)

In line with the requirements of the Preferential Procurement Policy Framework Act, 2000, and its Regulations and SARS Preferential Procurement Policy, only bidders that have met or exceeded the minimum threshold for functionality in the technical evaluation, will be evaluated further.

SARS will apply the applicable preference point system in accordance with published preference point system. Should actual pricing proposals submitted by the bidders differ from the estimated costs prescribing the system to be used, the lowest acceptable tender will be used to determine the applicable preference point system.

Table 7C: Price and B-BBEE/specific goals evaluation

#	Criteria	Points
1.	Price	80
2.	B-BBEE / Specific goals	20
TOTAL		100

7.4.1 Price evaluation (Gate 2, Stage 1)

Points for the price evaluation will be calculated in accordance with the formula stated below.

Bidders are required to complete all line items in the pricing response template provided by SARS. The price should be all-inclusive for all the goods and services required in the scope of work, and bidders must ensure the completeness and accuracy of the pricing figures provided in the pricing response template. Failure to complete the pricing response template may lead to a bidder scoring zero for the pricing evaluation or disqualification of the bidder.

Table 8: Pricing evaluation formula

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

Where

P_s = Points scored for price of proposal under consideration

P_t	=	Rand value of proposal under consideration
P_{min}	=	Rand value of lowest acceptable proposal

7.4.2 B-BBEE/specific goals evaluation (Gate 2, Stage 2)

Points for specific goals can only be awarded to a bidder who submits a valid B-BBEE certificate or affidavit, Share Certificate of the company or CIPC registration documents or letter from an attorney or registered accountant in their letterhead for the verification of ownership points claimed.

Bidders who do not claim preference points may be scored zero for specific goals.

Failure of a bidder to submit a B-BBEE certificate from a verification agency accredited by the South African Accreditation System (SANAS), a CIPC B-BBEE Certificate for Exempted Micro Enterprise (EME), or a sworn affidavit confirming annual turnover and level of black ownership in the case of an Exempted Micro Enterprise (EME) and Qualifying Small Enterprise (QSE) together with the proposal, will be considered in a manner that preference points for Specific goals are not claimed.

The B-BBEE certificate or affidavit should be submitted in the name of the bidding entity. If the proposal is submitted by an incorporated joint venture, the incorporated joint venture must submit their B-BBEE status level verification certificate or affidavit.

If the proposal is submitted by an unincorporated joint venture arrangement, the unincorporated joint venture must submit a consolidated B-BBEE certificate or affidavit as if they were a group structure, and that such consolidated B-BBEE certificate or affidavit is prepared for every separate proposal.

SARS reserves the right to request bidders to submit proof of any information, to substantiate claims made about their Specific goals.

Requirements for Specific Goals

- Bidders MUST complete and sign the SBD 6.1 form to claim the Bidder's B-BBEE preference points. Bidders who do not claim preference points may be scored zero for Specific goals.
- The B-BBEE certificate or sworn affidavit should be submitted in the name of the bidding entity. Entities who are in a holding and subsidiary relationships must submit a list / annexure of the B-BBEE certificate indicating the subsidiaries to the holding company. The bidding subsidiary must be clearly indicated.

- Incorporated JVs or Consortiums must submit the B-BBEE certificate or affidavit of the entity. Unincorporated JVs must submit a consolidated B-BBEE certificate as if they were a group structure for every separate bid.
- JVs or Consortiums are also required to submit signed JV or Consortium agreements.
- SARS reserves the right to request bidders to submit proof of any information, to substantiate claims made about their Specific goals.

Table 9: B-BBEE/specific goals evaluation points allocation

B-BBEE/specific goals evaluation criteria	Points
Bidders to submit: a) A duly completed SBD 6.1 Preference point claim form, and b) A valid B-BBEE certificate or sworn affidavit.	20

Points to be claimed

The following table indicates the specific goals and points to be claimed for this RFP and Evidence required.

No	The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Evidence required
1.	An entity that is an Exempted Micro Enterprise (EME)/or a Qualifying Small Enterprise (QSE).	4	B-BBEE Certificate /B-BBEE Sworn-Affidavit (in case of JV, a consolidated scorecard will be accepted).
2.	An entity with at least 51% Black Ownership.	5	B-BBEE Certificate/B-BBEE Sworn-Affidavit (In case of JV, a consolidated scorecard will be accepted).
3.	An entity with at least 30% Black Women Ownership.	5	B-BBEE Certificate /B-BBEE Sworn-Affidavit (In case of JV, a consolidated scorecard will be accepted).
4.	An entity with at least 51% Black Youth Ownership.	4	B-BBEE Certificate / B-BBEE Sworn-Affidavit (In case of JV, a consolidated scorecard will be accepted).

No	The specific goals allocated points in terms of this tender	Number of points allocated (80/20 system) (To be completed by the organ of state)	Evidence required
5.	An entity owned by Persons with Disabilities.	2	B-BBEE Certificate / B-BBEE Sworn-Affidavit. SARS reserves the right to request for Certified copy of ID Documents of the Owners and Doctor's note confirming the disability and/or Employment Equity Act 1(EEA1) form.

7.4.3 Consolidation of price and B-BBEE/specific goals evaluation (Gate 3)

The points scored by a bidder for the price evaluation and the B-BBEE/specific goals evaluation will be added together to determine the overall points a bidder's proposal will score out of 100 points for the consolidated price and B-BBEE/specific goals evaluation and ranking of the bidders.

7.5 FINANCIAL RISK ANALYSIS

The bidders are required to submit complete sets of annual financial statements, for the three (3) most recent financial periods in the name of the bidding entity. The annual financial statements must either be audited or independently reviewed in accordance with the public interest score (PIS) in compliance with the Companies Act, Act 71 of 2008, and the bidders are required to submit the public interest score (PIS) in compliance with the Companies Act, Act 71 of 2008. The annual financial statements must contain:

- A statement of profit and loss and other comprehensive income;
- A statement of financial position;
- A statement of cash flows;
- A statement of changes in equity / net assets; and
- Accompanying notes
- If the bidder cannot provide the preceding year's audited / independently reviewed financial statements as part of its bid submission, the bidder should submit draft annual financial statements or its latest management accounts, together with the three (3) most recent years audited / independently reviewed annual financial statements.
- Bidders who have been trading for less than three (3) financial periods must provide:

- A letter detailing the fact, signed by a duly authorised representative of the entity;
 - The annual financial statements that the entity can provide, considering the period that it has been trading; and
 - Any other information or documentation which would provide more clarity on the financial history of a bidder.
- h) SARS reserves the right to request further information regarding the annual financial statements of a bidder at a later stage to demonstrate the potential bidder's financial capability. These will include, but are not limited to:
- i) Holding company's / Parent company's accounts;
 - j) Management accounts;
 - k) Signed letter from a recognised financial institution confirming capital availability and bank statements; and/or
 - l) Credit rating reports (confirming capital availability or access to capital).
- m) In the event of a subsidiary being the bidding entity and it submits the holding company's financial statements for financial analysis purposes, the holding company must furnish a Performance Guarantee that is signed by a Financial Service Provider (Guarantor) of the holding company, stating that the Guarantor will undertake to cover any or all risks associated with a bidder, in the event the bidder is awarded the RFP.
- n) If the proposal is submitted by an incorporated joint venture, the incorporated joint venture is required to submit annual financial statements of the joint venture. If the proposal is submitted by an unincorporated joint venture / consortium arrangement, the unincorporated joint venture / consortium is required to submit annual financial statements of each of the parties to the arrangement.
- o) SARS reserves the right to request a financial guarantee from the recommended bidder(s) prior to award, based on the financial risk evaluation outcome.
- p) If a supplier / bidder submits a bid which does not include sufficient security as required by SARS, or its financial assessments and credit rating is assessed as a high risk to SARS, the bid may be considered as non-responsive.

7.6 RECOMMENDED BIDDERS' DUE DILIGENCE AND RISK ASSESSMENT PRIOR TO AWARD

- 7.6.1 SARS has a legal and moral obligation to ensure that a supplier's financial position does not place public money or services at unacceptable risks and will therefore perform due diligence and risk assessment of recommended bidder(s) prior to award.
- 7.6.2 As part of due diligence and risk assessment, the bidder must ensure that the bidder is complying to all regulatory prescripts, including industry regulations specific to the commodity/services procuring, that are applicable to this tender, as well as ethical business practices. SARS has the right to request evidence of this compliance from the bidder, and third parties, for purposes of the due diligence exercise and for audit or contracting arrangements.

- 7.6.3 In the event that a due diligence exercise reveals that a recommended bidder does not comply with SARS' risk appetite or compliance requirements then SARS has the right not to make an award to the recommended bidder.
- 7.6.4 The recommended bidder(s) will be required to consent in the agreement to continuous and in-depth due diligence to ensure ethical business practices throughout the term of the tender.

7.7 PROPOSED SERVICES AGREEMENT

7.7.1 Upon award, SARS and the successful bidder will conclude the Services Agreement. In this regard:

- The draft Services Agreement constitutes the specialised terms and conditions upon which SARS is prepared to contractually engage the prospective Bidder(s) to render the services under this bid.
- The bidder is requested sign the supplied pro forma document and to indicate their acceptance of the terms and conditions set out in the draft Agreement in their bid proposal covering letter.

7.7.2 Upon award, SARS and the successful bidders will conclude the Supplementary Agreement. In this regard:

- The draft Services Agreement constitutes the specialised terms and conditions upon which SARS is prepared to contractually engage the prospective Bidder(s) to render the services under this bid.
- The bidder is requested to indicate acceptance of the terms and conditions set out in the draft supplementary in their bid proposal covering letter.
- SARS will be entitled to cease contracting with a bidder if SARS, in its sole discretion, is of the opinion that: (i) the bidder has made misrepresentations in its proposal; (ii) the bidder is attempting to withdraw from positions or commitments made in its proposal; or (iii) an agreement may not be expeditiously concluded with the bidder for any other reason.
- SARS reserves the right to vary the terms and conditions of the proposed Services Agreement prior to presenting the final draft of the Services Agreement for signature to the bidder at SARS' sole discretion.

A bidder should note that the terms of its proposal to the extent that it aligns with the RFP, will be incorporated in the proposed Services Agreement by reference and that SARS relies upon the bidder's proposal as a material representation in making an award to a successful bidder and in concluding a Services Agreement with the bidder. It follows therefore that any misrepresentations in a proposal may result in legal action or other processes by SARS against the bidder, notwithstanding the conclusion of a Services Agreement between SARS and the bidder for the provision of the goods and services in question.

7.8 INSURANCE AND RELATED RISK MONITORING

- 7.8.1 The successful bidder will be required to provide, on or before the effective date of the Services Agreement and which shall be maintained for the duration of the Agreement, adequate insurance cover consistent with acceptable and prudent business practices and acceptable to SARS, with a financially sound and legally recognised insurance provider, which shall include, without limitation, professional indemnity insurance cover.
- 7.8.2 In addition to the insurance cover contemplated in paragraph 7.8.1 above, continually monitor and assess all regulatory, commercial or business risk that may emerge or arise out of the services contemplated in this RFP or the execution thereof, and take appropriate, reasonably commensurate measures which may include additional or supplementary insurance to cover itself against any such risk.

7.9 INDEMNITY

7.9.1 Indemnity in respect of the RFP

If a bidder breaches any condition of this RFP and, as a result of that breach, SARS incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the RFP process and/or enforcement or defence of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds SARS harmless from any and all such costs which SARS may incur and for any damages or losses SARS may suffer.

7.9.2 Indemnity in respect of the Services Agreement

A successful bidder shall indemnify, hold harmless and agree to defend SARS and its officers, employees, agents, successors and assigns, against all claims or Losses (Losses as defined in the Services Agreement) arising from, or in connection with, any of the following-

- a) Third party claims attributable to any breach of the provisions of the Services Agreement by the successful bidder;
- b) Third party claims attributable to theft, fraud or other unlawful activity or any negligent, wilful or fraudulent conduct by the successful bidder or its Personnel and claims attributable to errors and/or omissions;
- c) Third party claims arising from or related to the death or bodily injury of any SARS agent, employee, customer, business invitee, or business visitor or other person on SARS' premises caused by the delictual conduct of the successful bidder or its Personnel; and
- d) Third party claims arising from damage to property owned or leased by SARS or a third party caused by the acts or omissions of the successful bidder or its Personnel.

7.10 LIABILITY

- 7.10.1 The successful bidder shall be liable to SARS, where SARS has suffered any direct damages and/or Losses as a result of the successful bidder's failure to observe its obligations in terms of the Services Agreement.
- 7.10.2 The successful bidder shall further be liable to SARS for all indirect and consequential or special damages and/or Losses suffered by SARS as a result of gross negligence, wilful misconduct or breach by the successful bidder or its Personnel of confidentiality provisions in the Services Agreement, breach of Applicable Laws, infringement of third party intellectual property rights or a criminal act committed by the successful bidder, its Personnel or any employee of the successful bidder.

8. TRUSTS, JOINT VENTURES, SUBCONTRACTING AND OTHER ARRANGEMENTS

8.1 Proof of existence of a trust, joint venture, consortium and subcontracting arrangements

8.1.1 Where, for the purposes of this RFP, a bidder submits its proposal as a trust, such bidder must submit concrete proof of the existence of a trust. SARS will accept a registered trust deed as acceptable proof of the existence of a trust. The trust deed must include amongst others:

- Details of the trustees of the trust; and
- Details of the beneficiaries of the trust. In instances where the beneficiary is a trust, the trust deed of that specific trust is required.

8.1.2 Where, for the purposes of this RFP, a bidder submits its proposal as a joint venture or consortium (incorporated or unincorporated), the bidder must submit the joint venture / consortium agreement, which sets forth the following details:

- identification of each party to the agreement in full;
- the percentage ownership of the joint venture / consortium of each party to the agreement (if applicable);
- the precise functions and responsibilities which each party will fulfil in terms of the agreement. This should include details of the delimitations of scope within the goods and services to be assigned to such a party(ies);
- the anticipated percentage of the revenue that the party(ies) would receive (anticipated revenue that the party(ies) would receive as a percentage of the total revenue the bidder would anticipate receiving over the term of the agreement with SARS), if the bidder is successful; and
- clearly set out the roles and responsibilities of the Lead Partner and the remainder joint venture / consortium party(ies). The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party(ies) in respect of matters pertaining to the joint venture.
- If a bidder is submitting a proposal in the form of an unincorporated joint venture / consortium, the SBD 4 Bidder's disclosure form should be completed by each party participating in the joint venture / consortium agreement, and proof of CSD

registration should be submitted for all parties participating in the joint venture / consortium for this RFP.

- Joint venture members should be advised that each member will be held jointly and severally liable for the performance of the joint venture.

8.1.3 Where, for the purposes of this RFP, a bidder has or intends to subcontract areas of scope of the goods and services, the bidder must submit the subcontracting agreement, and must note the following:

- the bidder must indicate the name of the subcontractor(s), the percentage of the contract that will be subcontracted, the B-BBEE status level of the subcontractor(s) and whether the subcontractor(s) is an EME or QSE;
- a bidder awarded a contract, may only enter into a subcontracting arrangement with the approval of SARS;
- the agreement will be concluded between the main contractor(s) and SARS, therefore, the main contractor(s) and not its/their subcontractor(s) will be held liable for performance in terms of its contractual obligations;
- the successful bidder must, at all times, be solely and entirely accountable to SARS for the performance of its contractual obligations in terms of the agreement; and
- Without diminishing the bidder's accountability in any way for the delivery of the services, including the performance standards, SARS may require: access to and transparency in the subcontracting agreements; the full details of the functions which the subcontractor will fulfil in terms of the agreement including details of the delimitations of scope within the services to be assigned to such a subcontractor; monitoring and reporting of subcontractor's participation and performance to SARS; direct participation of subcontractor(s) in the account and project planning activities; and subcontractors' representation in governance structures and committees. SARS will, at all times, demand fair dealing in the relationship between a bidder and its subcontractor(s).

9. COMPLAINTS AND ALLEGATIONS

9.1 Should a Bidder have rational reasons to believe that the tender process is unfair or irregular, including the fact that the technical specifications are not open and/or are written for a particular bidder, brand or product; the bidder is urged to notify the Procurement Department within ten (10) days after publication of the bid and provide details of its complaint for SARS' consideration.

9.2 Any suspicious activity, including requests, approaches or calls asking for upfront payment to secure an award of a bid or in lieu of claims that the outcome of a tender can be influenced towards a particular bidder, bidders are requested to immediately inform the *SARS Fraud / Anti-Corruption* Hotline at 0800-002870 or email at anti-corruption@sars.gov.za for further investigation.

- 9.3** The “SARS hotline” further provides an anonymous reporting channel for any unethical behaviour that a bidder wants to report.

10. GENERAL CONDITIONS OF BIDDING

- 10.1** By bidding, a bidder, is deemed to have accepted all terms and conditions of this RFP; and is further deemed to have accepted that if successful, any award made will be made subject to the terms and conditions of this RFP.

10.2 Reservation of rights

10.2.1 In addition to any rights which SARS has reserved to itself in this document or any other document in the RFP pack, SARS reserves the right in its sole discretion to:

- a) make no award, or to accept part of a proposal rather than the whole;
- b) withdraw, or cancel this RFP;
- c) amend, vary, or supplement any of the information, terms or requirements contained in this RFP, any information or requirements delivered pursuant to this RFP, or the structure of the RFP process;
- d) schedule additional briefing sessions / site inspections, and to conduct site visits, site inspections, product evaluations, local content evaluations, and/or perform audits including due diligence exercises on any bidder whenever SARS deems it prudent to do so;
- e) no longer consider a bidder’s proposal where adverse information about the bidder or
- f) its proposal submission has come to the attention of SARS, provided that such bidder is informed accordingly and afforded an opportunity to object;
- g) subject to applicable legislation and conditions of tender, award a proposal based on which bidder is offering the best value for money, even if such proposal has not scored the highest points during the evaluation;
- h) conduct a risk assessment of a bidder’s capability to deliver the goods and perform the services in accordance with the specified service levels and/or achieve SARS’ objectives;
- i) request clarification or verification in respect of any information contained in or omitted
- j) from a bidder’s proposal, which SARS may do either in writing or at a meeting convened with the bidder for that purpose;
- k) conduct a due diligence on any bidder or its subcontractor, which may include interviewing customer references or performing other activities to verify information and capabilities submitted, claimed, or otherwise, (including visiting a bidder’s, subcontractors, or customer reference premises, sites and/or facilities

to verify certain stated facts or assumptions). The bidder will be obliged to grant SARS with all such access, assistance and/or information as SARS may reasonably request. The bidder must respond within the timeframes set by SARS, failing which SARS reserves the right not to consider the bidder's proposal any further; and/or

- l) request presentations from such short-listed bidders. All costs relating to the preparation of such presentations will be borne by the bidders.

10.2.2 SARS will disqualify any bidder, report to the National Treasury and take the necessary steps to restrict a bidder from doing business with the State, who:

- a) engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this RFP;
- b) seeks any assistance, other than assistance officially provided by a government entity, from any employee, advisor or other representative of a government entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a government entity;
- c) makes or offers any gift, gratuity, anything of value or other inducement, whether lawful
- d) or unlawful, to any of SARS' officers, directors, employees, advisors or other representatives;
- e) makes or offers any gift, gratuity, anything of any value or other inducement, to any government entity's officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a government entity;
- f) accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a government entity;
- g) pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, which is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a government entity;
- h) has been found guilty in a court of law or administrative or regulatory authority having appropriate jurisdiction on charges of unethical or improper conduct, regardless of whether or not a prison term or penalty was imposed;
- i) is listed on the National Treasury's Register for Tender Defaulters or the National Treasury's Database of Restricted Suppliers; or
- j) whose tender contains a misrepresentation which is materially incorrect or misleading.

10.2.3 Bidders' own conditions

- a) Bidders may not come up with their own terms and conditions, counter conditions, modify or vary any of the terms, conditions or requirements herein. SARS may disqualify any bidder who fails to comply with this clause.

10.3 Conflict of interest

- 10.4.1 If at any time a bidder identifies an actual or potential conflict of interest, the bidder must immediately notify SARS in writing. SARS reserves the right to exclude the proposal submitted by such bidder from further consideration, unless the bidder is able to resolve the conflict to SARS' satisfaction. If it comes to SARS' knowledge that there was indeed a conflict of interest or a potential conflict of interest, same will be grounds for the immediate disqualification of the bidder.

10.5 Confidentiality

- 10.6.1 Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, information contained in a bidder's proposal(s) may not be disclosed by any bidder, other than to a person officially involved with SARS' examination and evaluation of a proposal.
- 10.6.2 Throughout this RFP process and thereafter, the bidders must secure SARS' written approval prior to the release of any information that pertains to (i) the potential work or activities to which this RFP relates; or (ii) the process which follows this RFP. Failure to adhere to this requirement may result in disqualification from the RFP process and such legal action as SARS may deem suitable.

10.7 Fronting

- 10.8.1 SARS supports the spirit of broad-based black economic empowerment and recognises that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background SARS condemns any form of fronting.
- 10.8.2 SARS, in ensuring that bidders conduct themselves in an honest manner will, as part of the bid evaluation processes, conduct or initiate the necessary enquiries / investigations to determine the accuracy of the representations made in the bid documents. Should any of the fronting indicators as contained in the Guidelines on Complex Structures and Transactions and Fronting, issued by the Department of Trade and Industry be established during such enquiry / investigation, the onus will be on the bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the bid / contract and may also result in the restriction of the bidder / contractor to conduct business with the public sector for

a period not exceeding ten years, in addition to any other remedies SARS may have against the bidder / contractor concerned.

10.9 Indemnity

10.9.1 Indemnity in respect of the RFP

If a bidder breaches any condition of this RFP and, as a result of that breach, SARS incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the RFP process and/or enforcement or defence of intellectual property rights or confidentiality obligations), then the bidder indemnifies and holds SARS harmless from any and all such costs which SARS may incur and for any damages or losses SARS may suffer.

10.9.2 Indemnity in respect of the Services Agreement

- a) A successful bidder shall indemnify, hold harmless and agree to defend SARS and its officers, employees, agents, successors-in-title, and assigns, from any and all Losses (Losses as defined in the Services Agreement) arising from, or in connection with, any of the following-
- b) Third party claims attributable to any breach of the provisions of the Services Agreement by the successful bidder;
- c) Third party claims attributable to theft, fraud or other unlawful activity or any negligent, wilful or fraudulent conduct by the successful bidder or its employees and claims attributable to errors and/or omissions;
- d) Third party claims arising from or related to the death or bodily injury of any SARS agent, employee, business invitee, or business visitor or other person on SARS's premises caused by the negligent acts or omissions of the successful bidder or its employees; and
- e) Third party claims arising from damage to property owned or leased by SARS or a third party caused by the successful bidder's or its employees' negligence or misconduct.

10.10 Intellectual property

10.10.1 Intellectual property in respect of the RFP

- a) SARS retains ownership of all intellectual property rights in the documents that form part of this RFP.
- b) Bidders will retain the intellectual property rights in their proposals but grant SARS the right to reproduce any copyrighted works for the purposes of the tender process.

10.10.2 Intellectual property in respect of the Services Agreement

- a) Subject to pre-existing intellectual property rights of the successful bidder and/or any third party, all intellectual property rights created in the course of executing the services shall vest exclusively in SARS, regardless of whether or not such rights are capable of registration. To this end, the successful bidder irrevocably and in perpetuity transfers, makes over and assigns to SARS all such intellectual property rights which may come into existence pursuant to the services or the Services Agreement.
- b) The successful bidder hereby indemnifies and holds SARS harmless against Losses (Losses as defined in the Services Agreement), claims, proceedings and expenses of whatsoever nature in respect of any infringement by the successful bidder or its consultants of Intellectual Property rights of any third party
- c) Subject to any specific provisions in any supplementary agreement, master services agreement, work orders or change orders or any other agreement.

10.11 Limitation of liability

A bidder participates in this RFP process entirely at its own risk and cost. SARS will not be liable to compensate a bidder on any grounds whatsoever for any costs incurred or any damages suffered as a result of the bidder's participation in this RFP process.

10.12 Preparation costs

A bidder will bear all its costs in preparing, submitting, delivering, and presenting any response or proposal to this RFP and all other costs incurred by it throughout the RFP process. No statement in this RFP will be construed as placing SARS, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the bidders in the preparation of their response to this RFP.

10.13 Precedence

The terms and conditions of this document will prevail over any information provided during any briefing session or communication, whether oral or written, unless such information is official written communication, as set out per the Communication paragraph in this document, and that such information expressly states that it amends this document.

10.14 Responsibility for bidder's personnel and subcontractors

10.14.1 A bidder is responsible for ensuring that its personnel (including agents, officers, directors, employees, advisors and other representatives of a bidder), its subcontractors (if any), and personnel of its subcontractors comply with all the terms and conditions of this RFP.

10.14.2 SARS allows a bidder to make use of subcontractors, such subcontractors will at all times remain the responsibility of the bidder and SARS will not under any circumstances be liable for any losses or damages incurred by such subcontractors.

10.14.3 The proposal shall however be awarded to the bidder as a primary contractor who shall be responsible for the management of the awarded proposal. No separate contract shall be entered into between SARS and/or its client and any such subcontractors.

10.14.4 If a bidder includes evidence of experience of individuals that are not currently employed by the said bidder, then the bidder is required include in their submission a letter or agreement from the respective individual whose evidence of experience is included in the proposal, that the individual is aware and is in agreement that their evidence of experience may be included for tendering purposes, and that the said individual confirms to commit and will make him/herself available for the contract period should the contract be awarded.

10.14.5 If a bidder includes experience of an entity other than the bidder itself, then the bidder must include in their submission a letter or agreement from the respective entity that the entity is aware and agrees that their experience may be included for tendering purposes. Copies of the signed agreements between the relevant parties must be attached to the proposal responses.

10.15 Prohibition of participation in resultant tender

Any bidder, whether participating in a trust, joint venture, consortium and/or subcontracting arrangement, who participates in preparatory work on the basis of which another tender will flow, may not participate in the resultant tender because of the advantage of having been privy to the underlying preparatory work.

10.16 RFP not an offer

This RFP does not constitute an offer to do business with SARS but merely serves as an invitation to bidders to facilitate a requirements-based decision process. Nothing in this RFP or any other communication made between SARS (including its officers, directors, employees, advisers and representatives) is a representation that SARS will offer, award or enter into an agreement with the bidder.

10.17 SARS' oath / affirmation of secrecy

SARS has a Policy in terms of which the successful bidder; key personnel or any other personnel as may be determined by SARS will be required, upon award, to individually take a mandatory oath/ declaration/ affirmation of secrecy. The award will therefore be made subject to the condition that the successful bidder along with the personnel referred to above comply with the afore mentioned Policy.

10.18 Screening and vetting of a bidder

- 10.18.1 Acceptance of a bidder's proposal is subject to the condition that both the successful bidder and its personnel providing the goods and services, must be screened and cleared by the appropriate authorities to the grade of clearance in line with SARS' applicable policies.
- 10.18.2 Obtaining the necessary clearance is the responsibility of the successful bidder concerned. If the successful bidder appoints a subcontractor, the same provisions and measures will apply to the subcontractor.
- 10.18.3 The bidders shall supply and maintain a list of personnel involved on the project indicating their clearance status.

10.19 Tax compliance

- 10.19.1 It is a requirement that any supplier conducting business with SARS is tax compliant at the date of award of a contract / bid and remains tax compliant throughout the duration of their contracts with SARS. In this regard, the following applies:
- a) SARS must verify supplier/ bidder's tax compliance status prior to the awarding of a contract.
 - b) No contract / bid may be awarded to a supplier who is not tax compliant.
 - c) Where the recommended supplier / bidder is not tax compliant, it must be notified in writing of their non-compliant status and be granted a minimum of seven (7) working days to submit written proof regarding their tax compliance status with SARS or proof that arrangement has been made with SARS to meet their outstanding tax obligations.
 - d) Should the recommended bidder/ supplier fail to provide written proof of their tax compliance status as contemplated in paragraph 10.19 above, SARS as the procuring entity must reject the bid submitted.
 - e) Accordingly, the supplier / bidder is responsible to provide SARS with proof of its tax compliance status which must be verified through the Central Supplier Database or e-Filing.
- 10.19.2 *Verification and/or confirmation of tax compliance status during the course and scope of executing awarded contract*
- a) SARS reserves the right to request the supplier or successful bidder to provide written proof of tax compliance status at any time during the execution of the awarded contract.
 - b) Further, SARS reserves the right to withdraw an award made, or cancel a contract concluded with a supplier / successful bidder in the event that it is established that such supplier / bidder was in fact not tax compliant at the time of the award.

- c) Furthermore, SARS reserves the right to cancel a contract with a supplier / successful bidder in the event that such supplier/bidder does not remain tax compliant for the full term of its contract.
- d) In line with SARS's strategic objectives, the directors / owners of the bidding entity who are not tax compliant may be referred to the SARS tax compliance unit for further investigation in order to achieve full tax compliance.

10.20 Tender defaulters and restricted suppliers

10.20.1 No bid will be awarded to a bidder whose name (or any of its members, directors, partners or trustees) appears on the National Treasury's Register for Tender Defaulters or the National Treasury's Database of Restricted Suppliers.

10.21 Local production and content

10.21.1 SARS supports and promotes local production and local content, environmentally friendly products, and sustainable sourcing.

10.21.2 To enable this objective to be adequately assessed and as part of contract management, bidders shall advise SARS of its local and regional strategy and its initiatives to involve, support and use local/regional entities and workforce.

10.21.3 The appointed supplier shall provide and use, for the performance of this contract, local subcontractors or locally acquired materials, equipment and facilities, to the extent available and within reasonable costs, to produce the quality and quantity of work and materials required by this contract.

10.22 Validity of information

10.22.1 SARS has made reasonable efforts to ensure the accuracy of the information contained in this RFP. However, neither SARS, nor its employees, officers, advisers or agents will be liable (directly or otherwise) to a bidder or any third party for any inaccuracy or omission of any information in the RFP or in respect of any additional information SARS may provide to a bidder as part of the RFP process.

10.22.2 A bidder is deemed to have examined this RFP and any other information supplied by SARS to the bidder and to have satisfied itself as to the correctness and sufficiency of such information before submitting any of its responses.

10.23 Governing law

10.23.1 This RFP and any resultant agreement shall be governed by the laws of the Republic of South Africa.

11. CHECKLIST OF RETURNABLES

Table 11: Checklist of returnable documents

	Checklist of returnable documents	Comply	Do not comply	Section
1.	A hardcopy and an electronic copy RFP proposal submission has been submitted for this RFP.			
2.	The pricing information is included as a separate file (File 2) and is not included in the Mandatory file (File 1).			
3.	SBD 1: Invitation to bid form has been completed and signed.			
4.	SBD 4: Bidder's Disclosure has been completed and signed.			
5.	SBD 6.1: Preference point claim form has been completed, points for B-BBEE / specific goals claimed, and signed.			
6.	Proof of registration on the Central Supplier Database (CSD) has been submitted.			
7.	<ul style="list-style-type: none"> Response to Technical Requirements – this response is to be substantiated in the proposal submission and Bidder to indicate where in the proposal submission this offering is substantiated (page and paragraph) and bidder should not score themselves on this technical evaluation sheet (this is a guidance document) 			
8.	Annexure B: Testimonial Template			
9.	Draft Services Agreement/ General Conditions of Contract (GCC) has been completed and signed.			
10.	All the pricing evaluation requirements have been submitted with this bid and the pricing template has been completed in full and signed.			
11.	All the B-BBEE/specific goals evaluation and specific goal requirements have been submitted with this bid.			