

SOUTH AFRICAN REVENUE SERVICE

REQUEST FOR PROPOSAL

RFP 04/2025

NETWORK CARRIER AND INFRASTRUCTURE SERVICES

MAIN RFP DOCUMENT

INSTRUCTIONS, GUIDELINES, AND CONDITIONS OF TENDER

TABLE OF CONTENT

1	PURPOSE OF THIS REQUEST FOR PROPOSAL.....	3
2	PREAMBLE	3
3	OVERVIEW OF SARS'S REQUIREMENTS	7
4	STRUCTURE OF THE RFP PACK.....	9
5	KEY ACTIVITIES AND DATES	11
6	COMMUNICATION	13
7	TENDER PREPARATION AND SUBMISSION.....	13
8	EVALUATION OF PROPOSALS.....	16
9	TRUSTS, JOINT VENTURES, SUB-CONTRACTING, AND OTHER ARRANGEMENTS	83
10	COMPLAINTS AND ALLEGATIONS.....	84
11	GENERAL CONDITIONS OF BIDDING	85
12	INSTRUCTIONS FOR SUBMITTING A RESPONSE TO THIS RFP	93

REQUEST FOR PROPOSAL

Summary, Guidelines, Conditions, and Instructions

1 PURPOSE OF THIS REQUEST FOR PROPOSAL

- 1.1 The South African Revenue Service (SARS) invites suitably qualified service providers (Bidders) to submit proposals (tenders) in accordance with the rules that are set out in this RFP for appointment as a service provider(s) on a non-exclusive basis.

2 PREAMBLE

- 2.1 SARS invites suitably qualified service providers to submit proposals in accordance with the rules that are set out in this RFP to supply the areas of scope (each of which will be referred to as a “**Tower**”) listed below on a non-exclusive basis and as defined in more detail in this and other documents that form part of this RFP.

Data Carrier (WAN) Services Tower (Tower D)	<p>The supply of Data Carrier (WAN) Services to SARS, including:</p> <ul style="list-style-type: none"> - SDWAN (including SASE); private intellectual-property network connectivity; edge networking service; mobile network service; digital monitoring; and all related data carrier services, including service management, monitoring, reporting, support, consulting, and advisory services.
Voice Carrier Services Tower (Tower V)	<p>The supply of Voice Carrier Services to SARS, including:</p> <ul style="list-style-type: none"> - Preferred inbound and outbound voice services and all specific cost-saving solutions for SARS’s outbound voice requirements to fixed and mobile destination requirements. - Related voice-carrier services such as PABX solutions; and - Related voice-carrier services, including service management, monitoring, reporting, support, consulting, and advisory services.

Communication/s Platform as a Service Tower (CPaaS) (Tower C)	<p>The supply of a Unified Communication/s Platform as a Service Carrier (CPaaS) for services that include:</p> <ul style="list-style-type: none"> - The replacement of <i>current</i> services including carriage of computer-generated SMS, Unstructured Supplementary Service Data (USSD), short URL messages (e.g. bit.ly), and <i>possible future services</i> including bulk email messages, printed letters, <i>social media</i>, live chat, and artificial intelligence (AI) or large language models (LLM) through operators to clients; and - Related Communications Platform as a Service (CPaaS) Carrier common service such as account management, monitoring & reporting, support, consulting, and advisory services.
---	--

Proposals may be submitted by Bidders for 1 (one) or more of the 3 (three) Towers.

Prospective Bidders' attention is drawn to the important conditions stated below relating to the award of the scope of this RFP.

Tower D

SARS requires a single service provider to be accountable for its Data Carrier Network Services, including all carrier elements underpinning SARS's WAN. SARS does not require the Service Provider to provide all the Data Carrier Network Services itself, and the service provider may source different elements of the Data Carrier Network Services from other service providers (sub-contractors), provided that the service provider manages the provision of the individual elements in a manner that SARS deems as seamless. Sub-contractors must be fully accountable for all aspects of the services, including meeting the service levels.

Therefore, SARS intends to appoint a single service provider for all the services in Tower D with the provisions of the exclusivity within Business Requirements Specifications (BRS).

Tower V

SARS's objective is to award the scope of Tower V to a Service Provider subject to it maintaining the lowest cost for calls at acceptable quality for both inbound and outbound services. SARS retains the right to award certain services of the scope (e.g. outbound calls or inbound calls to different voice carrier providers [“Preferred Outbound Voice Carrier Provider and Preferred Inbound Voice Carrier

Provider”)). SARS is under no obligation to appoint a Bidder as a Preferred Outbound Voice Carrier Provider if no Bidder’s Proposal provided a more cost-effective solution for outbound voice traffic. SARS is under no obligation to appoint a Bidder as a Preferred Inbound Voice Carrier Provider if no Bidder’s proposal provided a more cost-effective solution for inbound voice traffic.

Tower C

Tower C is divided into four (4) categories, namely, Category A, Category B, Category C, and Category D. A Bidder can respond to any one combination of the four (4) categories.

The categories are:

Category A: operating capacity for SMS, USSD, or short-message code (e-Booking) messages, short URL (e.g. bit.ly), MMS; and operating capacity for SMS traffic. SARS intends to award the scope of Tower C (SMS) — Category A — to a minimum of two (2) service providers. During the term, SARS will periodically, at least once a year, update the routing algorithms for its SMS traffic to the service providers based on quality, availability, performance, and pricing, as service providers improve their offering.

SARS will award the operating capacity for SMS, or short-message code messages, traffic to a minimum of two (2) service providers that ranked high after consolidation of Price and Specific goals. A Bidder responding to this requirement must complete the following tabs in the *SARS RFP 04-2025 5-3-C Tower C Pricing Response Template Category A*: TC.1, TC.2, TC.5, TC.6, and TC.7.

SARS will award the USSD services to a single service provider ranked number 1 after consolidation of Pricing and Specific goals. A Bidder responding to this requirement must complete the following tabs in the *SARS RFP 04-2025 5-3-C Tower C Pricing Response Template Category A*: TC.4, TC.6, and TC.7.

SARS will award the short URL to a single service provider ranked number 1 after consolidation of Pricing and Specific goals. A Bidder responding to this requirement must complete the following tabs in the *SARS RFP 04-2025 5-3-C Tower C Pricing Response Template Category A*: TC.3, T.6, and TC.7.

Category B: operating capacity for bulk email messages. SARS will appoint a panel of service providers, because this category comprises technical requirements that SARS may have in the future. All service providers that meet the required threshold after technical evaluation will be appointed to the panel and, when the need arises, SARS will issue a Request for a Quotation (RFQ) to all the service

providers on the panel to quote for the services.

Depending on the nature of the future requirements that SARS will require during the contract period within the scope of Category B, SARS will issue an RFQ that will be evaluated under the following options:

- Appoint a Bidder on technical evaluation criteria (where technical capacity is a requirement for new request), and on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.
- Appoint a Bidder based on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.

Category C: operating capacity for printed letters. SARS will appoint a panel of service providers, as these are future requirements. All service providers that meet the technical evaluation criteria will be appointed on the panel and, when the need arises, SARS will issue an RFQ to all the service providers who have been appointed on the panel. Depending on the nature of SARS's requirements during the contract period within the scope of Category C, SARS will issue an RFQ that will be evaluated under the following options:

- Appoint a Bidder on technical evaluation criteria (where technical capacity is a requirement for new request), and on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.
- Appoint a Bidder based on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.

Category D: operating capacity for social media, live chat and AI/LLM. All service providers that meet the technical evaluation criteria will be appointed to the panel and, when the need arises, SARS will issue an RFQ to all the service providers that will be appointed to the panel. Depending on the nature of SARS's requirements during the contract period within the scope of Category D, SARS will issue an RFQ that will be evaluated under the following options:

- Appoint a Bidder on technical evaluation criteria (where technical capacity is a requirement for new request), and on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.
- Appoint a Bidder based on price and specific goals, in line with the Bidder's ranking, per 80/20 or 90/10 preference points to acquire goods and services. SARS will perform due diligence before SARS pronounces on the outcome of the RFQ evaluations.

3 OVERVIEW OF SARS'S REQUIREMENTS

3.1 Summary of the Scope

Details of the scope of work and the required goods and services are defined in the Business Requirements Specification document and other documents that form part of this RFP.

Tower D:

SARS currently operates within an established architecture and infrastructure framework provided mostly by Cisco with some firewalls of Fortinet. As such, the specifications outlined in the tender document must align with the capabilities and compatibility of these existing OEMs.

Tower V:

SARS currently operates within an established architecture and infrastructure framework provided by Cisco SBC's. As such, the specifications outlined in the tender document must align with the capabilities and compatibility of this existing OEM.

Tower C

SARS future earmarked platforms to optimise communication includes WhatsApp, Facebook, Twitter/X, Telegram, LinkedIn, and Remedy/Dynamics365 or similar, or other social media platforms. As such, the specifications outlined in the tender document must align with the capabilities and compatibility of these platforms.

3.2 Background

SARS Vision 2030 is committed to building a future-ready organization that leverages emerging technologies, advanced analytics, and resilient digital ecosystems to deliver sustainable value. Our

technology infrastructure must embody innovation, security, and adaptability to global trends, ensuring operational excellence and integrity. Through strategic partnerships and foresight-driven transformation, SARS aims to create a modern, agile platform that fosters trust, enhances compliance, and positions the organization to anticipate and respond to future challenges with confidence.

This tender for the Tower Infrastructure contracts for Towers D, V, and C is aligned with SARS's Strategic Objectives, including:

Objective 1: Provide clarity and certainty for taxpayers and traders of their obligations.

Objective 2: Make it easy for taxpayers and traders to comply with their obligations.

Objective 6: Modernise our systems to provide digital and streamlined services.

Objective 5: Increase and expand the use of data within a comprehensive knowledge-management framework to ensure integrity, drive insight, and improve outcomes.

The primary objective of this RFP is to provide for the delivery, continuity, and cost-effectiveness of SARS's data carrier (WAN), voice carrier, and CPaaS carrier services.

SARS has sought to simplify the definition of the services by specifying the requirements, as far as possible, without specifying the detail of the underlying technologies. This approach puts greater emphasis on the agreed service levels, while allowing the service provider freedom to configure the technology solutions in the most cost-effective manner. This approach is particularly evident in the requirements specification in Towers D, V, and C.

- 3.2.1 SARS's objectives in issuing this RFP do not include contracting to transform the network to newer technologies. Rather, SARS aims to contract services that will allow for the deployment of newer technologies that will improve the quality of services and provide value for money. During the term of the Network Carrier and Infrastructure Services Agreement, inevitable developments in carrier technologies and service-based offerings demand that SARS maintains a flexible approach in engaging service providers to ensure that SARS can take advantage of such developments. This Business Requirements Specification sets out, to the extent that it has currently been determined, the strategic direction that SARS is taking regarding services in the Towers. In some of the Towers, the strategic direction will affect, distribution, and requirements for underlying technologies. These are presented for reasons of transparency to enable the service providers contracted work with knowledge of SARS's plans (which are subject to approvals, budget, and capacity). The information presented in this document is to the best of the SARS's knowledge at the time of issuing this RFP.

Flexibility, however, remains a key principle regarding the directions presented, which may change during the term.

4 STRUCTURE OF THE RFP PACK

4.1 Structure

4.1.1 This RFP pack is organised into 5 (five) sections, and each section consists of one document or more.

Table 4A: RFP Pack Outline and Contents

Section	Index	Description of section contents
1	Main RFP Document	Document outlining 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, technical requirements, and other information required by a Bidder to submit a proposal.
3	Standard Bid Documents (SBDs)	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 proposed agreement under which SARS wishes to contract the services.
5	Response templates	Where applicable, response templates that Bidders must complete and return as part of a Bidder's proposal.

Table 4B: RFP Pack Contents

Section	Document name	Document file name
1	RFP Invitation Letter	SARS RFP 04-2025 1-0 Invitation Letter
	RFP Main Document	SARS RFP 04-2025 1-1 Main Document
2	Business Requirements Specification	SARS RFP 04-2025 2-1 Business Requirement Specifications
	SARS Site Classifications	SARS RFP 04-2025 2-2 SARS Site Classifications
	WAN Diagram	SARS RFP 04-2025 2-3 WAN Diagram
	WAN Inventory	SARS RFP 04-2025 2-4 WAN Inventory
	SDWAN Diagram	SARS RFP 04-2025 2-5 SDWAN Diagram
3	Invitation to Bid (SBD1)	SARS RFP 04-2025 3-1 Invitation to Bid (SBD 1)

SARS CONFIDENTIAL

Section	Document name	Document file name
	Declaration of Interest (SBD 4)	SARS RFP 04-2025 3-2 Declaration of Interest (SBD 4)
	National Industrial Participation Programme (SBD 5)	SARS RFP 04-2025 3-3 National Industrial Participation Programme (SBD 5)
	Preference Points Claim Form (SBD 6.1)	SARS RFP 04-2025 3-4 Preference Points Claim Form (SBD 6.1)
	Supplier Cost and Risk Assessment Questionnaire	SARS RFP 04-2025 3-5 Supplier Cost and Risk Assessment Questionnaire
4	Network Carrier and Infrastructure Services Agreement	SARS RFP 04-2025 4-1 Network Carrier and Infrastructure Services Agreement
	Data Protection Agreement — Tower Data-Voice-CPaaS	SARS RFP 04-2025 4-2 Data Protection Agreement — Tower Data-Voice-CPaaS
	Appendix E-4 — Incident Management Major Priority Process	SARS RFP 04-2025 4-3 Appendix E-4 — Incident Management Major Priority Process
	General Contract of Conditions (GCC)	SARS RFP 04-2025 4-4 General Contract of Conditions (GCC)
	Tower D Contract Response Template	SARS RFP 04-2025 4-5 Tower D Contract Response Template
	Tower V Contract Response Template	SARS RFP 04-2025 4-6 Tower V Contract Response Template
	Tower C Contract Response Template	SARS RFP 04-2025 4-7 Tower C Contract Response Template
5	Tower D Mandatory Response Template	SARS RFP 04-2025 5-1-D Tower D Mandatory Response Template
	Tower V Mandatory Response Template	SARS RFP 04-2025 5-1-V Tower V Mandatory Response Template
	Tower C Mandatory Response Template Category A	SARS RFP 04-2025 5-1-C Tower C Mandatory Response Template Category A
	Tower C Mandatory Response Template Category B	SARS RFP 04-2025 5-1-C Tower C Mandatory Response Template Category B
	Tower C Mandatory Response Template Category C	SARS RFP 04-2025 5-1-C Tower C Mandatory Response Template Category C

Section	Document name	Document file name
	Tower C Mandatory Response Template Category D	SARS RFP 04-2025 5-1-C Tower C Mandatory Response Template Category D
	Tower D Technical Response Template	SARS RFP 04-2025 5-2-D Tower D Technical Response Template
	Tower V Technical Response Template	SARS RFP 04-2025 5-2-V Tower V Technical Response Template
	Tower C Technical Response Template Category A	SARS RFP 04-2025 5-2-C Tower C Technical Response Template Category A
	Tower C Technical Response Template Category B	SARS RFP 04-2025 5-2-C Tower C Technical Response Template Category B
	Tower C Technical Response Template Category C	SARS RFP 04-2025 5-2-C Tower C Technical Response Template Category C
	Tower C Technical Response Template Category D	SARS RFP 04-2025 5-2-C Tower C Technical Response Template Category D
	Tower D Pricing Response Template	SARS RFP 04-2025 5-3-D Tower D Pricing Response Template
	Tower V Pricing Response Template	SARS RFP 04-2025 5-3-V Tower V Pricing Response Template
	Tower C Pricing Response Template Category A	SARS RFP 04-2025 5-3-C Tower C Pricing Response Template Category A
	Proposal Checklist	SARS RFP 04-2025 5-4 Proposal Response Checklist

5 KEY ACTIVITIES AND DATES

- 5.1 The table below lists certain key dates and activities relevant from the time that the RFP is issued to the closing date

Table 5A: Key activities and dates

No.	Activity	Date/time/details
1.	Bid number:	RFP 04/2025
2.	Description:	Network Carrier and Infrastructure Services

No.	Activity	Date/time/details
3.	Duration of contract:	The successful Bidder will be appointed for 5 (five) years, with an option to renew the contract for a further 2 (two) years at SARS's sole discretion, subject to SARS's terms and conditions.
4.	Validity period of proposals:	Bids submitted will be valid for 180 calendar days from the closing date. However, SARS may, subject to the Bidders' consent, extend the validity period prior to its expiry.
5.	Advertisement of the RFP:	SARS website: 17 February 2026 National Treasury Tender Portal: 17 February 2026
6.	RFP pack (complete set of bid documents) available for download from National Treasury's e-Tender Portal and SARS website:	17 February 2026
7.1	Compulsory Virtual briefing session date and link:	<p>The compulsory virtual briefing session will take place on:</p> <p>04 March 2026 at 10:00 AM</p> <p>Via the following link: Join the meeting now</p> <p>Meeting ID: 370 395 231 929 16 Passcode: Sr7cp9pz</p> <p>NB: Bidders are requested to join at 09:30 am for registration.</p>
7.2	Compulsory virtual Price Templates workshop	<p>The virtual price templates workshop will take place on:</p> <p>05 March 2026 at 10:00 AM</p> <p>Via the following link: Join the meeting now</p> <p>Meeting ID: 379 245 884 072 64 Passcode: S4Ce3DF3</p>

No.	Activity	Date/time/details
		NB: Bidders are requested to join at 09:30 am for registration.
8.	Bidders to submit written questions:	17 February 2026 to 17 April 2026
9.	SARS to respond to Bidders' written questions from:	18 February 2026 to 20 April 2026
10.	Closing date and time (proposals due):	12 May 2026 at 11:00 AM Late bid submitted after the closing date and time will NOT be accepted nor considered, regardless of the method used to send or deliver such documents to SARS.

- 5.2 All dates and times in this RFP are South African Standard Time (UTC+2). The establishment of a time or date in this RFP does not obligate SARS to take any action or create any right or expectation 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, the requirements of this RFP will apply equally to the extended deadline.

6 COMMUNICATION

- 6.1 All communication to SARS must be addressed to the SARS Tender Office, emailed to tenderoffice@sars.gov.za, and contain a clear reference to this RFP. Communication sent by SARS must be regarded as official communication only if sent from tenderoffice@sars.gov.za, or if a communication accompanied by a letter of authorisation signed by the SARS Procurement Executive.
- 6.2 A Bidder must communicate with SARS regarding this RFP only through the official contact details provided in this document. SARS may, at its sole discretion, disqualify a Bidder if the Bidder uses unauthorised channels to communicate or attempt 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.

7 TENDER PREPARATION AND SUBMISSION

7.1 Introduction

7.1.1 SARS has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under section 76 of the Public Finance Management Act, 1999 (Act 1 of 1999), which prescribes that SARS's procurement processes be:

7.1.1.1 Economical, efficient, fair, equitable, transparent, competitive, and cost effective; and

7.1.1.2 Consistent with the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000), its Regulations, and the Broad-Based Black Economic Empowerment (B-BBEE) Act, 2003 (Act 53 of 2003).

7.2 Question-and-answer Process

7.2.1 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.

7.2.2 Between the dates given in section 5, SARS will take written questions sent by Bidders via email through the official contact provided in this document. SARS will respond to these questions but 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. In its responses, SARS will not disclose the identity of a Bidder who has directed a question to SARS.

7.2.3 SARS may issue updated versions of documents issued in the RFP pack or may issue additional documentation to form part of the RFP pack. Such reissued or additional documentation will be published on the National Treasury e-Tender Portal and SARS website. It is a Bidder's responsibility to visit the National Treasury e-Tender Portal and SARS website regularly to ensure that it uses the latest versions of documents in the RFP pack.

7.2.4 **The National Treasury e-Tender Portal must be treated as the primary means of communication regarding updates to the RFP. Should there be any other communication that conflicts with communications posted on the National Treasury e-Tender Portal, the National Treasury e-Tender Portal communication will prevail.**

7.3 Central Supplier Database (CSD)

7.3.1 All Bidders who wish to do business with SARS must register on the government's CSD at www.CSD.gov.za and include their CSD Master Registration Number in their submission. The recommended Bidder(s) must be registered on the CSD prior to an award letter/purchase order/signed contract being issued.

- 7.3.2 Foreign suppliers with neither South African tax obligations nor history of doing business in South Africa must complete the questionnaire on SBD 1.

7.4 Proposal Submission

- 7.4.1 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.
- 7.4.2 The physical proposal submissions must be deposited in the SARS tender box on or before the closing date and time at the SARS Tender Office, situated at the main entrance:

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

- 7.4.3 The proposals may also be couriered to the address provided in the above paragraph.
- 7.4.4 Proposals will be considered only if received by the SARS Tender Office before the closing date and time
- 7.4.5 SARS will not accept late proposals.
- 7.4.6 The onus is on the Bidder to ensure that its proposal submission and documentation received by SARS in this bid are submitted timeously, accurate and complete. Failure by any Bidder to discharge this onus will result in proposal submissions being disqualified.

7.5 Instruction for Submitting a Proposal

- 7.5.1 This section details the instructions to Bidders to prepare a proposal in response to this RFP. Bidders must follow these instructions exactly 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. If SARS receives a proposal in an incorrect 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.
- 7.5.2 All proposals and supporting documentation must be submitted in English.
- 7.5.3 A Bidder's proposal must be submitted in two forms:

1 x Hardcopy submission	<p>One (1) hardcopy submission clearly marked.</p> <p>A “hardcopy submission” means an A4 ring-bound lever-arch file.</p>
1 x 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>

7.5.4 The hardcopy and electronic submission must be marked and labelled correctly, and must be externally sealed, wrapped, and packaged for ease of reference during the evaluation process.

7.5.5 Bidders are requested to refer to section 12, which is a guide of how a Bidder must submit their proposal.

8 EVALUATION OF PROPOSALS

8.1 Process after the Closing Date

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

8.2 Pre-qualification Evaluation Process (Gate 0)

8.2.1 SARS has defined minimum administrative pre-qualification criteria that the Bidder must meet. The table below contains the administrative pre-qualification documents that are required as part of a Bidder’s proposal. A representative authorised by the prospective Bidder(s) must complete and sign these documents.

8.2.2 Where a Bidder’s proposal fails to comply fully with any of the pre-qualification criteria, SARS may, at its discretion, allow the Bidder an opportunity to submit or supplement the information 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.

8.2.3 **SARS will disqualify a Bidder that does not achieve full compliance of the pre-qualification SBD after the provided grace period.**

Table 8A: Prequalification Criteria

No:	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 5: National Industrial Participation Programme Form	Bidder to complete and sign the supplied pro forma document.	YES
4.	SBD 6.1: Preference Points Claim Form	Bidder to complete and sign the supplied pro forma document, to claim the points for Broad-Based Black Economic Empowerment (B-BBEE/specific goals).	NO Non-submission will lead to a zero score on B-BBEE/specific goals.
5.	Proof of Registration on the CSD	Bidder to submit the proof of registration on CSD.	NO However, a Bidder must be registered on the CSD to be considered for award.
6.	Draft Agreement	Bidder to sign the supplied pro forma document.	NO The recommended Bidder(s) will be required to sign the applicable 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 8.6 as detailed in this RFP.	NO

8.3 Mandatory Evaluation Process (Gate 1)

8.3.1 Only Bidders who have met the pre-qualification criteria in Gate 0 will be evaluated in Gate 1 for mandatory evaluation. The table below contains the mandatory evaluation criteria.

8.3.2 **If a Bidder does not meet any of the mandatory evaluation criteria, the Bidder will be disqualified, and the Bidder's proposal will not be evaluated further.**

Table 8B: Mandatory Evaluation Criteria for Tower D

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special-purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, incorporated JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>
2.	Licences	<p>The Bidder must possess Independent Communications Authority of South Africa (ICASA) Individual ECS (I-ECS) regulatory licence to provide the services for which it is bidding for in Tower D.</p> <p>NB: The Bidder must provide an official ICASA letter as proof of its licence(s). The Bidder may rely on regulatory licences held by a parent company or subsidiary, provided that the Bidder submits a satisfactory explanation of how such reliance will comply with regulatory requirements and provides a warranty of compliance. The Bidder may not rely on a third party's licence(s). The evidence of licence-holding must correspond with the licence(s) the Bidder claims to hold.</p>
3.	Cisco Partner Specialisation	<p>The Bidder must confirm (in Response Table A of the SARS RFP 04-2025 5-1-D Tower D Mandatory Response Template, by indicating "Confirm/ Do not Confirm") whether it holds a valid Cisco Preferred Networking Partner designation, enabling it to provide the services for which it is bidding in Tower D.</p> <p>The Bidder must submit a Channel Certification Letter from Cisco, proving they hold the following designation:</p>

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<ul style="list-style-type: none"> • Cisco Preferred Networking Partner <p>NB: The Bidder itself must be a Cisco Preferred Networking Partner and cannot rely on a sub-contractor to fulfil this requirement.</p> <p>NB: SARS reserves the right to verify the Bidder's CISCO status, either through the CISCO locator or consultations with CISCO. If it is found that the Bidder has misrepresented its CISCO partner's status, the Bidder will be disqualified from further evaluations.</p> <p>NB: If the Bidder will be submitting documentation / proof of designation / Cisco Preferred Networking Partner status of its parent / holding company and/or subsidiary, the Bidder must submit a letter which demonstrates the relationship between the (2) companies in terms of ownership. In this instance the Bidder also need to submit proof in the form of a signed confirmation letter from the OEM that the Bidder, as a separate subsidiary of its parent / holding company, is deemed to hold the same designation as a Cisco Preferred Networking Partner of its holding company by virtue of the relationship and ownership structure and that the Bidder is allowed to and can leverage off and benefit from the Cisco Preferred Networking Partner designation of its holding / parent company. This confirmation must derive directly from the OEM confirming that the Bidder as a subsidiary / division of its holding / parent company is deemed to be certified for the purposes of this mandatory requirement.</p>
4.	SD-Wan Network Services	<p>The Bidder is required to complete required information and confirm under declaration (in response template A of the <u>SARS RFP 04-2025 5-1-D Tower D Mandatory Response Template</u> by indicating "yes/no" under declarations) that it has been operating an SD-WAN network for at least one South African customer of similar size to SARS for a minimum of one year, covering 100 or more sites.</p> <p>The Bidder itself must have been providing such services and cannot rely on a subcontractor to fulfil this requirement.</p> <p>Note: The information provided by the Bidder in Table A (of the mandatory response template) will be used to assess if the Bidder meets these requirements. The Bidder</p>

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
		should only declare "yes" if the information provided in Table A complies with the SARS mandatory requirements.
5.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend the briefing session, the Bidder will be disqualified.</p>
6.	Compulsory price-schedules workshop session (Hybrid)	<p>The Bidder(s) must have attended the compulsory price-schedules workshop session.</p> <p>NB: An attendance register will be taken at the compulsory price workshop session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, as per the Mandatory Response template). If the Bidder does not attend the price-schedules workshop session, the Bidder will be disqualified.</p>

Table 8C: Mandatory Evaluation Criteria for Tower V

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special-purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, incorporated JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>
2.	Licences	<p>The Bidder must possess Independent Communications Authority of South Africa (ICASA) Individual ECS (I-ECS) regulatory licence to provide the services for which it is bidding for in Tower V.</p>

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>NB: The Bidder must provide an official ICASA letter as proof of its licence(s). The Bidder may rely on regulatory licences held by a parent company or subsidiary, provided that the Bidder submits a satisfactory explanation of how such reliance will comply with regulatory requirements and provides a warranty of compliance. The Bidder may not rely on a third party's licence(s). The evidence of licence-holding must correspond with the licence(s) the Bidder claims to hold.</p>
3.	Preferred Outbound Voice Carrier	<p>If the Bidder is submitting only a proposal for the Preferred Outbound Voice Carrier Provider Services, then the Bidder must complete and confirm (in the Mandatory response template, by filling in Table A of the <u>SARS RFP 04-2025 5-1-V Tower V Mandatory Response Template</u> and also declare “yes/no” under declarations) that, it has provided a similar service to a current or recent service provider, carrying outbound calls over SIP channel infrastructure from the customers’ site(s) to a terminating network operator for a minimum of two (2) years (per customer) at least two (2) customers over the past five (5) years and that its outbound voice carrier has a statistical data showing that its network can accommodate more than 25 000 outbound calls a day, which must be routed directly to the cellular network providers’ network via interconnection links with a call quality MoS value of 3.8.</p> <p>NB: All outbound traffic must be routed via dedicated Voice Links for the sites that are not on SDWAN. The requirement is that all SARS offices will make use of outbound calls. All voice links must be fully redundant, with a secondary link in place. The call routing must be based on least-cost routing.</p> <p>Note: Please refer to the BRS for detailed requirements.</p> <p>NB: The Bidder itself must have been providing such services and cannot rely on a subcontractor to fulfil this requirement.</p>
4.	Preferred Inbound Voice Carrier	<p>If the Bidder is submitting only a proposal for the Preferred Inbound Voice Carrier Provider Services, then the Bidder must complete and confirm (in the Mandatory response template, by filling in Table A of the <u>SARS RFP 04-2025 5-1-V Tower V Mandatory Response Template</u> and also declare “yes/no” under declarations) that, it has provided similar service to a current or recent customer routing inbound SIP calls via SIP Trunks from the customers’ site(s) to a terminating network operator for a minimum of two (2) years (per customer) at least two (2) customers over the past five (5) years and that the Bidder has proposed a complete Inbound SIP Trunk solution that covers 100% of the solution with geographical redundancy options.</p>

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>NB: The bidder must be able to port the current Inbound Smartaccess and tollfree numbers onto their network. SARS currently has 13 tollfree and shared numbers.</p> <p>NB: Geographical redundancy means that the VoIP solution will connect to both ALB and DRK. This will offer geo-redundancy to SARS Test- and Production Sites, with a VoIP Platform for automatic failover should a site-specific SIP Instance fail, and vice versa. Currently, the design is an “Active-Active” fully geo-redundant system. The Preferred Inbound Voice Carrier provider must provide a SIP Trunking solution for break-in and -out at Alberton campus, Brooklyn (Pretoria), and Doringkloof offices. This must support G.729 Codecs, G2, G3, and G4 Fax (T.38); direct dialling inward; direct dialling outward; caller-line identification presentation; caller-line identification restriction; call forward; and number barring. The SIP Trunk solution must be fully redundant with 24/7 support. Minimum concurrent SIP sessions should be 1 860 per site to support G.729. Please refer to the BRS for the full requirement.</p> <p>Note to Bidder/Evaluator: The Bidder must provide interconnectivity for voice calls within and outside South Africa. The SIP Trunk service must be scalable.</p> <p>NB: The Bidder itself must have been providing such services and cannot rely on a subcontractor to fulfil this requirement.</p>
5.	Network Operation Centre	<p>The Bidder must confirm (in the <u>SARS RFP 04-2025 5-1-V Tower V Mandatory Response Template</u>) that the bidder has its own Network Operation Centre existing in South Africa for at least three (3) years, with a centralised call-logging facility to provide customer support 24 hours a day, 7 days a week, and 365 days a year.</p> <p>NB: A Bidder must confirm (in the Mandatory response template) that the bidder has its own Network Operation Centre existing in South Africa for at least three (3) years, with a centralised call logging facility to provide 24 hours a day, 7 days a week, and 365 days a year customer support.</p>
6.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend the briefing session, the Bidder will be disqualified.</p>

No:	Mandatory Evaluation Criteria	Bidder to submit as proof
7.	Compulsory price-schedules workshop session (Hybrid)	<p>The Bidder(s) must have attended the price-schedule workshop session.</p> <p>NB: An attendance register will be taken at the compulsory price-schedules workshop session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend the price-schedules workshop session, the Bidder will be disqualified.</p>

Table 8D: Mandatory Evaluation Criteria for Tower C, Category A: [SMS, USSD, Short Message, MMS, Short URL Link Carrier Solution]

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, incorporated JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>
2.	Licences	<p>The Bidder must possess Independent Communications Authority of South Africa (ICASA) Individual ECS (I-ECS) regulatory licence to provide the services for which it is bidding in Tower C.</p> <p>NB: The Bidder must provide an official ICASA letter as proof of its licence(s). The Bidder may rely on regulatory licences held by a parent company or subsidiary, provided that the Bidder submits a satisfactory explanation of how such reliance will comply with regulatory requirements and provides a warranty of compliance. The Bidder may not rely on a third party's licence(s). The evidence of licence-holding must correspond with the licence(s) the Bidder claims to hold.</p>

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
3.	Security	<p>SARS aims to establish the alignment between SARS Security requirements and the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to implemented client(s).</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of secure Services in this Tower.</p> <ul style="list-style-type: none"> SARS also seeks to establish if the bidder's Service has the following mandatory components: <ol style="list-style-type: none"> 1. IPsec: IPsec (Internet Protocol Security) is a set of protocols designed to secure internet communications by encrypting and authenticating data packets. It provides confidentiality, data integrity, and authentication for data transmitted across public networks through encrypted tunnels. IPsec supports various encryption methods and operates in two modes: tunnel mode (encrypts the entire packet) and transport mode (encrypts only the payload). It is widely used to create secure VPN connections. 2. VPN: A Virtual Private Network (VPN) is a technology that creates a secure and encrypted connection over a less secure network, such as the internet. VPNs enable users to send and receive data as if their devices were directly connected to a private network, thereby providing privacy and security. An IPsec VPN uses the IPsec protocol to establish the encrypted tunnel that protects data traffic. 3. Firewalls: Firewalls are security devices or software that monitor, and control incoming and outgoing network traffic based on predetermined security rules. They act as a barrier between trusted internal networks and untrusted external networks, protecting against unauthorized access and cyber threats. Firewalls filter traffic to block malicious or unwanted data while allowing legitimate communication. 4. Encryption: Encryption is the process of converting plain text or data into a coded form (ciphertext) using an algorithm and an encryption key, making it unreadable to unauthorized parties. It ensures confidentiality and protects sensitive information during storage or transmission. Decryption is the reverse process, requiring a key to convert the ciphertext back to its original form.

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>5. RSA-based data centres: The bidder's data centres where SARS data may be stored must be in South Africa.</p> <p>The evidence must be provided by the Bidder in the form a declaration on the Bidder's letterhead signed by a duly appointed Director, and the declaration must indicate all requirements as stipulated in the ISO 27001 framework, as well as the comprehensive details for the mandatory requirements.</p> <p>NB: If the signed declaration letter is missing any of the five (5) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
4.	Operating Capacity for SMS, USSD, or Short Message Code Messages	<p>The Bidder must be able to carry at least 70 000 000 (seventy million) SMS, USSD or short-message code messages over a period of 12months.</p> <p>NB: A Bidder must submit a declaration on the Bidder company letterhead, signed by a director authorised to represent the company that affirms that the Bidder:</p> <ol style="list-style-type: none"> 1. Can carry at least 70 000 000 (seventy million) SMS, USSD, or short-message code messages to any cell phone network locally and; 2. Can carry to any cell phone network internationally; and that 3. The bidder has been operating for a consecutive period of 12 months. <p>NB: If the signed declaration letter is missing any of the three (3) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
5.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend the briefing session, the Bidder will be disqualified.</p>
6.	Compulsory price-schedules workshop session (Hybrid)	<p>The Bidder(s) must have attended the compulsory price-schedules workshop session.</p> <p>NB: An attendance register will be taken at the compulsory price-schedules workshop session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend the price-schedules workshop session, the Bidder will be disqualified.</p>

Table 8E: Mandatory Evaluation Criteria for Tower C, Category B: [Email Equipment Services Solution]

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>
2.	Licences	<p>The Bidder must possess Independent Communications Authority of South Africa (ICASA) Individual ECS (I-ECS) regulatory licence to provide the services for which it is bidding in Tower C.</p> <p>NB: The Bidder must provide an official ICASA letter as proof of its licence(s). The Bidder may rely on regulatory licences held by a parent company or subsidiary, provided that the Bidder submits a satisfactory explanation of how such reliance will comply with regulatory requirements and provides a warranty of compliance. The Bidder may not rely on a third party's licence(s). The evidence of licence-holding must correspond with the licence(s) the Bidder claims to hold.</p>
3.	Security	<p>SARS aims to establish the alignment between SARS Security requirements and the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to implemented client(s).</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of secure Services in this Tower.</p>

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<ul style="list-style-type: none"> • SARS also seeks to establish if the bidder's Service has the following mandatory components: <ol style="list-style-type: none"> 1. IPsec: IPsec (Internet Protocol Security) is a set of protocols designed to secure internet communications by encrypting and authenticating data packets. It provides confidentiality, data integrity, and authentication for data transmitted across public networks through encrypted tunnels. IPsec supports various encryption methods and operates in two modes: tunnel mode (encrypts the entire packet) and transport mode (encrypts only the payload). It is widely used to create secure VPN connections. 2. VPN: A Virtual Private Network (VPN) is a technology that creates a secure and encrypted connection over a less secure network, such as the internet. VPNs enable users to send and receive data as if their devices were directly connected to a private network, thereby providing privacy and security. An IPsec VPN uses the IPsec protocol to establish the encrypted tunnel that protects data traffic. 3. Firewalls: Firewalls are security devices or software that monitor, and control incoming and outgoing network traffic based on predetermined security rules. They act as a barrier between trusted internal networks and untrusted external networks, protecting against unauthorized access and cyber threats. Firewalls filter traffic to block malicious or unwanted data while allowing legitimate communication. 4. Encryption: Encryption is the process of converting plain text or data into a coded form (ciphertext) using an algorithm and an encryption key, making it unreadable to unauthorized parties. It ensures confidentiality and protects sensitive information during storage or transmission. Decryption is the reverse process, requiring a key to convert the ciphertext back to its original form. 5. RSA-based data centres: The bidder's data centres where SARS data may be stored must be in South Africa. <p>The evidence must be provided by the Bidder in the form a declaration on the Bidder's letterhead signed by a duly appointed Director, and the declaration must indicate all requirements as stipulated in the ISO 27001 framework, as well as the comprehensive details for the mandatory requirements.</p>

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		NB: If the signed declaration letter is missing any of the five (5) specified requirements, the bidder will be disqualified at this stage of the evaluation.
4.	Operating Capacity for Bulk Email Messages	<p>The Bidder must be able to carry at least 10 000 000 (ten million) email messages over a period of 12 months</p> <p>NB: A Bidder must submit a declaration on the Bidder company letterhead, signed by a director authorised to represent the company that affirms that the Bidder:</p> <ol style="list-style-type: none"> 1. Can carry at least 10 000 000 (ten million) emails to any email address locally; and 2. Can send emails internationally; and that 3. The bidder has been operating for a consecutive period of 12 months. <p>B: If the signed declaration letter is missing any of the three (3) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
5.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend the briefing session, the Bidder will be disqualified.</p>

Table 8F: Mandatory Evaluation Criteria for Tower C, Category C: [PRINTED LETTERS SOLUTION]

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws and operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, incorporated JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
2.	Compliance with SAPO regulations	<p>The Bidder must declare that it complies with current South African Post Office (SAPO) regulations to provide the services for which it is bidding in Tower C.</p> <p>NB: The Bidder must submit a declaration signed by a director authorised to do so, stating that the Bidder is compliant with relevant SAPO regulations.</p>
3.	Security	<p>SARS aims to establish the alignment between SARS Security requirements and the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to implemented client(s).</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of secure Services in this Tower.</p> <ul style="list-style-type: none"> • SARS also seeks to establish if the bidder's Service has the following mandatory components: <ol style="list-style-type: none"> 1. IPsec: IPsec (Internet Protocol Security) is a set of protocols designed to secure internet communications by encrypting and authenticating data packets. It provides confidentiality, data integrity, and authentication for data transmitted across public networks through encrypted tunnels. IPsec supports various encryption methods and operates in two modes: tunnel mode (encrypts the entire packet) and transport mode (encrypts only the payload). It is widely used to create secure VPN connections. 2. VPN: A Virtual Private Network (VPN) is a technology that creates a secure and encrypted connection over a less secure network, such as the internet. VPNs enable users to send and receive data as if their devices were directly connected to a private network, thereby providing privacy and security. An IPsec VPN uses the IPsec protocol to establish the encrypted tunnel that protects data traffic. 3. Firewalls: Firewalls are security devices or software that monitor, and control incoming and outgoing network traffic based on predetermined security rules. They act as a barrier between trusted internal networks and untrusted external networks, protecting against unauthorized access and cyber threats. Firewalls filter traffic to block malicious or unwanted data while allowing legitimate communication. 4. Encryption: Encryption is the process of converting plain text or data into a coded form (ciphertext) using an algorithm and an encryption key, making it unreadable to unauthorized parties. It ensures

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<p>confidentiality and protects sensitive information during storage or transmission. Decryption is the reverse process, requiring a key to convert the ciphertext back to its original form.</p> <p>5. RSA-based data centres: The bidder's data centres where SARS data may be stored must be in South Africa.</p> <p>The evidence must be provided by the Bidder in the form a declaration on the Bidder's letterhead signed by a duly appointed Director, and the declaration must indicate all requirements as stipulated in the ISO 27001 framework, as well as the comprehensive details for the mandatory requirements.</p> <p>NB: If the signed declaration letter is missing any of the five (5) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
4.	Operating Capacity for Printed Letters	<p>The Bidder must be able to carry at least 10 000 000 (ten million) printed letters over a period of 12 months</p> <p>NB: A Bidder must submit a declaration on the Bidder company letterhead, signed by a director authorised to represent the company that affirms that the Bidder can</p> <ol style="list-style-type: none"> 1. carry at least 10 000 000 (ten million) printed letters to any address locally and; 2. can send printed letters internationally; and that 3. The bidder has been in business for a consecutive period of 12-months. <p>NB: If the signed declaration letter is missing any of the three (3) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
5.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the Mandatory requirement, per the Mandatory Response template). If the Bidder does not attend the briefing session, the Bidder will be disqualified.</p>

Table 8G: Mandatory Evaluation Criteria for Tower C, Category D: [Future social media, Live Chat & AI/LLM Carrier Solution]

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
1.	Bidder Organisation	<p>SARS is interested only in organisations that take full accountability for service delivery. Thus, any Bidder, be it a juristic person, partnership, sole proprietor, or any special purpose vehicle, must take full accountability for service delivery.</p> <p>A Bidder must be registered in South Africa in terms of South African laws, and the Bidder must operate in South Africa.</p> <p>NB: The Bidder must have attached its CIPC registration. In terms of consortiums or JVs, incorporated JVs must submit their CIPC registration and unincorporated JVs must submit individual CIPC registration documents.</p>
2.	Licences, if applicable	<p>The Bidder must possess Independent Communications Authority of South Africa (ICASA) Individual ECS (I-ECS) regulatory licence or similar licensing authority or regulation, to provide the services for which it is bidding in Tower C, if applicable.</p> <p>NB: The Bidder must provide an official ICASA letter as proof of its licence(s). The Bidder may rely on regulatory licences held by a parent company or subsidiary, provided that the Bidder submits a satisfactory explanation of how such reliance will comply with regulatory requirements and provides a warranty of compliance. The Bidder may not rely on a third party's licence(s). The evidence of licence-holding must correspond with the licence(s) the Bidder claims to hold.</p>
3.	Security	<p>SARS aims to establish the alignment between SARS Security requirements and the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to implemented client(s).</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of secure Services in this Tower.</p> <ul style="list-style-type: none"> • SARS also seeks to establish if the bidder's Service has the following mandatory components: <ol style="list-style-type: none"> 1. IPSec: IPSec (Internet Protocol Security) is a set of protocols designed to secure internet communications by encrypting and authenticating data packets. It provides confidentiality, data integrity, and authentication for data transmitted across public networks through encrypted tunnels. IPSec supports various encryption methods and operates in two modes: tunnel mode (encrypts the entire packet) and transport mode (encrypts only the payload). It is widely used to create secure VPN connections.

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		<ol style="list-style-type: none"> 2. VPN: A Virtual Private Network (VPN) is a technology that creates a secure and encrypted connection over a less secure network, such as the internet. VPNs enable users to send and receive data as if their devices were directly connected to a private network, thereby providing privacy and security. An IPSec VPN uses the IPSec protocol to establish the encrypted tunnel that protects data traffic. 3. Firewalls: Firewalls are security devices or software that monitor, and control incoming and outgoing network traffic based on predetermined security rules. They act as a barrier between trusted internal networks and untrusted external networks, protecting against unauthorized access and cyber threats. Firewalls filter traffic to block malicious or unwanted data while allowing legitimate communication. 4. Encryption: Encryption is the process of converting plain text or data into a coded form (ciphertext) using an algorithm and an encryption key, making it unreadable to unauthorized parties. It ensures confidentiality and protects sensitive information during storage or transmission. Decryption is the reverse process, requiring a key to convert the ciphertext back to its original form. 5. RSA-based data centres: The bidder's data centres where SARS data may be stored must be in South Africa. <p>The evidence must be provided by the Bidder in the form a declaration on the Bidder's letterhead signed by a duly appointed Director, and the declaration must indicate all requirements as stipulated in the ISO 27001 framework, as well as the comprehensive details for the mandatory requirements.</p> <p>NB: If the signed declaration letter is missing any of the five (5) specified requirements, the bidder will be disqualified at this stage of the evaluation.</p>
4.	Operating Capacity for social media, Live Chat and AI/LLM	<p>The Bidder must be able to carry at least 10 000 000 (ten million) live chat messages over a period of 12 months.</p> <p>NB: A Bidder must submit a declaration on the Bidder company letterhead, signed by a director authorised to represent the company that affirms that the Bidder:</p> <ol style="list-style-type: none"> 1. Can carry at least 10 000 000 (ten million) live chat messages to/from any device locally and; 2. To/from any device internationally. 4. The bidder has been in business for a consecutive period of 12-months.

NO:	Mandatory Evaluation Criteria	Bidder to submit as proof
		NB: If the signed declaration letter is missing any of the three (3) specified requirements, the bidder will be disqualified at this stage of the evaluation.
5.	Compulsory Briefing Session (Hybrid)	<p>The Bidder(s) must have attended the compulsory briefing session.</p> <p>NB: An attendance register will be taken at the compulsory briefing session, and a certificate of attendance will be issued (which will be submitted as part of the mandatory requirement, per the Mandatory Response template). If the Bidder does not attend the briefing session, the Bidder will be disqualified.</p>

NB: Tower C is divided into four (4) Categories, namely, Category A, Category B, Category C, and Category D. A Bidder can respond to anyone (or combination) of the four (4) categories.

8.4 Technical Evaluation Process (Gate 2)

- 8.4.1 Only Bidders who have met the pre-qualification and mandatory evaluation requirements will be evaluated for technical capability and functionality, strictly according to the technical evaluation criteria below. A Bidder must provide a technical solution for the required goods and services that meets SARS's requirements, and that is financially competitive and offers value for money.
- 8.4.2 **For Tower D** - The technical evaluation will be scored out of 100 points. Bidders must score a minimum threshold of 70 out of 100 points to proceed to the next stage of evaluation, namely price and B-BBEE/specific goals evaluation.
- 8.4.3 **For Tower V & C** - The technical evaluation will be scored out of a total of 100 points, and bidders are required to score a minimum threshold of 66.67 out of 100 points to proceed to the next stage of evaluation, namely price and B-BBEE/specific goals evaluation.
- 8.4.4 **If a Bidder does not meet the technical-evaluation minimum threshold, it will be disqualified, and its proposal will not be evaluated further.**

NOTE:

To ensure that an objective and consistent evaluation is conducted of the proposed bidder's solution a structured scoring methodology will be used for both Tower V and Tower C.

Each criterion is allocated a weight based on relative importance and a 4-point scale of 0,1,2 and 3

is used to assess the proposal as follows:

3 - The bidder fully meets requirements and value adding is extensive

2 - Meets critical requirements

1 - Partially meets requirements & 0 - Company cannot meet, high risk

The calculation of your weighted score by the SARS evaluation committee will be based on the weight of the criteria factored by the 4-point scale. Example weight of 10, 0 equates to 0, 1 equates to 3,33, 2 equates to 6,67 and 3 equates to 10). These will vary according to the different weighting criteria.

The weighted score will be tallied for all criteria and bids that fail to meet the minimum threshold of 66.67 will not proceed to the next stage of evaluation.

Table 8H: Technical Evaluation Criteria for Tower D

No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
1.	Capability Criterion				30	
1.1.	Current Client Base	<p>SARS aims to establish the current capability of delivering services within the scope of this Tower. Bidders who can show that they are delivering services within the scope of this Tower to an established client-base of sufficient scale, similar or bigger than SARS’s client base, will achieve maximum points. Documentation, such as letters of reference from the clients substantiating the Bidder’s claims, must be attached.</p> <p>Services to at least one client with a minimum of 150 sites will achieve maximum points.</p>	<p>4: All technical elements of scope are currently delivered by the Bidder to at least one client, the same size or larger than SARS’s client base of 130 sites or more.</p> <p>2: All technical elements of scope are delivered by the Bidder to at least one client with a site-count of 101 up to 129 sites</p> <p>0: All technical elements of scope are delivered by the Bidder to at least one client with a site-count fewer than 100 sites.</p>		<p>4 = 9.00</p> <p>2 = 4.50</p> <p>0 = 0.00</p>	1
1.2.	Sub-contractor service for network underlay infrastructure	<p>SARS seeks to establish the nature and level of partnership or relationship between the Bidder and Sub-contractor to deliver network connectivity as part of the network-underlay services component of the SD-WAN solution.</p> <p>Bidders who can show the level of their partnership and track record with which it has engaged these sub-contractors in previous engagements and does not pose a risk to the delivery of service to SARS will achieve maximum points for this criterion.</p> <p>The Bidder must attach documentation to substantiate its claims to achieve maximum points.</p>	<p>4: The Bidder has indicated its ability to establish effective partnerships, with a proven track record, and their overall suitability for delivering network-connectivity services as part of the SD-WAN solution for SARS. All necessary criteria are met.</p> <p>0: The Bidder has failed to indicate their ability to establish effective partnerships and their overall suitability for delivering network-connectivity services as part of the SD-WAN solution for SARS. Not all necessary criteria are met.</p>		<p>4 = 6.00</p> <p>0 = 0.0</p>	2
1.3.	Bidder’s Strategic Direction (NaaS)	<p>SARS seeks to establish the extent to which the Bidder has a commitment to provide services based on each of the components listed in <i>Business Requirements Specification (6.4.1)</i>. These services must include Connectivity, Value Added Services (VAS), Virtual Network Functions (VNF), Managed Network Services, and similar Cloud services.</p> <p>The Bidder’s strategic direction regarding the development and delivery of these new technologies must inform SARS of enhancements to the services within this Tower. The Bidder must attach documents to support any claims made.</p>	<p>4: The Bidder has demonstrated a clear strategic direction regarding its NaaS model and can provide all the components and related services.</p> <p>0: The Bidder has demonstrated a poor strategic direction regarding its NaaS model and lacks the ability to provide all the components and related services.</p>	NaaS Components	<p>4 = 3.00</p> <p>0 = 0.00</p>	3.1
				Functional Requirements	<p>4 = 3.00</p> <p>0 = 0.00</p>	3.2
				Non-Functional Requirements	<p>4 = 1.50</p> <p>0 =0.00</p>	3.3
				Technical Requirements	<p>4 = 1.50</p> <p>0 =0.00</p>	3.4
1.4.	Service Centres	<p>SARS aims to establish the capability that the Bidder (and its sub-contractors) will deliver to SARS. Bidders who can show that its existing Service Centres have sufficient coverage of required skills will achieve maximum points. SARS will also consider the extent to which Service Centres that are not yet established are relied upon to provide distribution of skills.</p>	<p>4: The Bidder has a 100%-90% presence of Service Centres in all nine (9) provinces in terms of its location to SARS’s list of sites.</p> <p>2: The Bidder has 89%- 71% presence of Service Centres in all nine (9) provinces in terms of its location to SARS’s list of sites.</p> <p>0: The Bidder has 70% or less presence of Service Centres in all nine (9) provinces in terms of its location to SARS’s list of sites.</p>		<p>4 = 6.00</p> <p>2= 3.00</p> <p>0= 00</p>	4
2.	Technical Solution				50	
2.1.	Bidder’s SD-WAN Network Presence	<p>SARS aims to establish the Bidder’s current distribution of SD-WAN POPs — both current and planned — to be used to deliver SARS SD-WAN services.</p>	<p>4: The Bidder has a 100%-90% WAN Network presence in all nine (9) provinces in terms of its POPs to SARS’s list of sites.</p>		<p>4 = 7.50</p> <p>2 = 3.75</p> <p>0 = 0.00</p>	5

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
		Bidders with currently established SD-WAN POP locations and those planned in strategic areas to provide services to the SARS list of sites will score maximum points for this sub-criterion.	<p>2: The Bidder has 89%- 71% WAN Network presence in all nine (9) provinces in terms of its POPs to SARS's list of sites.</p> <p>0: The Bidder has 70% or less WAN Network presence in all 9 provinces in terms of its POPs to SARS's list of sites.</p>		
2.2.	Bidder's SD-WAN Capability	<p>SARS aims to establish the Bidder's capability to deliver a SD-WAN solution designed to optimise network performance, enhance security, and simplify network management. The Bidder will be evaluated on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown an understanding of SARS requirements as set out in the <i><u>Business Requirements Specification (6.4.1.1)</u></i>. <p>The Bidder's solution and design will meet or exceed SARS's requirements for SD-WAN availability, reliability, and connectivity, which include dual links to every site for direct internet access and one link for access to internal applications.</p>	<p>4: The Bidder understands the SARS SD-WAN requirement and can provide a secure, reliable, and redundant network to SARS's full list of sites. (The Bidder uses different Service Providers to provide the dual links to 90–100% of SARS sites.)</p> <p>0: The Bidder understands the SARS SD-WAN requirement and can provide a secure, reliable, and redundant network to some SARS's list of sites. (The Bidder uses different Service Providers to provide the dual links to less than 90% of SARS sites.)</p>	<p>4 = 7.50</p> <p>0 = 0.00</p>	6
2.3.	Bidder's SASE Solution and Capability	<p>SARS aims to establish whether the Bidder's SASE solution combines secure connectivity, network security, and network-management capabilities into a unified cloud-based service, as set out in the <i><u>Business Requirements Specification (6.4.1.1.2)</u></i>. A solution that fully meets the requirements for a single-vendor SASE offering to deliver a converged network and security capability, will receive maximum points. The Bidder must provide its SASE solution as an integrated part of the SD-WAN design.</p>	<p>4: All of SARS's SASE requirements are covered with an equivalent or better solution.</p> <p>0: The Bidder's SASE solution does not adequately meet SARS's requirements.</p>	<p>4 = 7.50</p> <p>0 = 0.00</p>	7
2.4.	Bidder's External/Public Network Connectivity	<p>SARS aims to establish whether the Bidder has the capability to provide dedicated and high-speed connectivity to its external and public-facing third parties. A solution that fully meets the requirements set out in the <i><u>Business Requirements Specification (6.4.1.2)</u></i> for External/Public Network Connectivity will receive maximum points.</p>	<p>4: All SARS External / Public Network Connectivity requirements are covered.</p> <p>0: The Bidder's External / Public Network Connectivity solution does not adequately meet SARS's requirements.</p>	<p>4= 5.00</p> <p>0 = 0.00</p>	8
2.5.	Bidder's Private 5G Capability	<p>SARS aims to establish the Bidder's ability to provide a reliable, high-bandwidth, and low-latency private 5G solution, with the ability to support multiple enterprise use-cases on a single network. The Bidder will be evaluated formally and generally on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown an understanding of SARS's requirements and has set out its response accordingly. The Bidder's private 5G capability will provide SARS with the ability to use a variety of edge devices at specified locations (airports, harbours, and border posts). <p>A solution that fully meets the requirements set out in the <i><u>Business Requirements Specification (6.4.2.1)</u></i> for Private 5G Capability will receive maximum points.</p>	<p>4: All SARS Private 5G Capability requirements are covered.</p> <p>0: The Bidder's Private 5G Capability solution does not adequately meet SARS's requirements.</p>	<p>4 = 2.50</p> <p>0 = 0</p>	9

No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
2.6.	Bidder's Mobile Network Service capability (APN Solution)	<p>SARS aims to establish the Bidder's ability to provide a mobile network, delivered via a corporate/private APN solution.</p> <p>The Bidder will be evaluated formally and generally on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown an understanding of SARS's requirements and has set out its response accordingly. <p>The Bidder's Mobile Network Service will provide SARS with the ability to use the corporate/private APN solution for all its mobile requirements set out in the <u>Business Requirements Specification (6.4.3)</u>.</p>	<p>4: All SARS APN requirements are covered.</p> <p>0: The Bidder's APN solution does not adequately meet SARS's requirements.</p>		4= 5.00 0 = 0.00	10
2.7.	Bidder's Digital Experience Monitoring (DES) Capability	<p>SARS aims to establish the Bidder's ability to provide a digital experience and intelligence platform (DES) that provides real-time insight into the performance of the network infrastructure, applications, and cloud services. The Bidder will be evaluated formally and generally on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown an understanding of SARS requirements and has set out its response in accordance with <u>Business Requirements Specification (6.4.4)</u>. 	<p>4: All SARS Digital Experience Monitoring requirements are covered.</p> <p>0: The Bidder's Digital Experience Monitoring solution does not adequately meet SARS's requirements.</p>		4 = 2.50 0 = 0	11
F2.8.	Bidder's satellite network capability	<p>SARS aims to establish the Bidder's ability to provide satellite communication services to its remote, temporary, and mobile sites.</p> <p>The Bidder will be evaluated on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown an understanding of SARS requirements and has set out its response in accordance with the <u>Business Requirements Specification (6.4.1.1.1)</u>. <p>The Bidder's satellite solution seamlessly integrates into the SD-WAN architecture to provide secure communication to the specified SARS locations.</p>	<p>4: All SARS satellite network capability requirements are covered.</p> <p>0: The Bidder's satellite network capability solution does not adequately meet SARS's requirements.</p>		4= 5.00 0 = 0.00	12
2.9.	Bidder's Network Services Portal	<p>SARS aims to establish the Bidder's ability to provide a comprehensive Network Services Portal as a platform that provides access to various network-related services, while ensuring security, reliability, and efficiency.</p> <p>The Bidder will be evaluated on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown an understanding of SARS's requirements and has set out its response in accordance with the <u>Business Requirements Specification (6.4.5)</u>. 	<p>4: The Bidder has shown a current solution or a clear and committed plan to deliver the functionality required and to meet all the requirements.</p> <p>0: The Bidder has shown a solution that is unacceptable to SARS and does not meet the specified requirements.</p>	Portal design (web based, user-friendly, simple, and intuitive interface)	4 = 1.25 0 = 0.00	13.1
				Range of Portal services (network design, installation, configuration, monitoring, and maintenance)	4 = 1.25 0 = 0.00	13.2
				Cloud-hosted solution, which is scalable, secure, and compatible with range of devices and browsers	4 = 1.25 0 = 0.00	13.3
				Reports of all events not repaired with the Service Levels.	4 = 1.25 0 = 0.00	13.4

No:	Sub-criterion	Inquiry	Specific evaluation guidelines		Inquiry weighting	TRT Reference
2.10.	Customer Provisioning Portal	<p>SARS aims to establish the Bidder's ability to provide a centralised platform that facilitates the automated and streamlined process of provisioning and managing IT network resources within SARS.</p> <p>The Bidder will be evaluated on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown an understanding of SARS's requirements and has set out its response in accordance with the <u>Business Requirements Specification (6.4.6)</u>. 	<p>4: The Bidder has shown a current solution or a clear and committed plan to deliver the functionality required and to meet all the requirements.</p> <p>0: The Bidder has shown a solution that is unacceptable to SARS and does not meet the specified requirements.</p>	Portal design (web based, user-friendly, simple, and intuitive interface).	4 = 2.50 0 = 0.00	14
3.	Service Management Solution				10	
3.1.	Service Management Compliance/Conformance	<p>SARS aims to establish that the Bidder follows a service-management framework, and that the Bidder has implemented a set of well-defined practices and processes for IT-services management. The Bidder must demonstrate its commitment to delivering high-quality IT services and to improving its service-management processes in line with SARS's requirements.</p> <p>The Bidder will be evaluated on the following basis:</p> <ul style="list-style-type: none"> The Bidder must demonstrate adherence to ISO/IEC 20000-1 standard OR that has provided a formal IT Service Management Maturity Assessment report indicating an overall Maturity score of 4 or higher will attain the maximum score. 	<p>4: The Bidder has indicated that its organisation adheres to a best-practice Service Management framework/standard and has provided one of the following as evidence: A valid ISO/IEC 20000-1 certificate OR a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of 4 (four) (quantitatively managed or equivalent) or higher.</p> <p>Bidders that provide a Maturity Assessment report as evidence, must adhere to the following requirements:</p> <ul style="list-style-type: none"> The Service Management Maturity Assessment must be based on the COBIT or ITIL Framework. The report must be produced by an accredited independent assessor/auditor. The letter confirming the accreditation of independent assessor/auditor must be provided. The report must be signed by the Bidder's CFO and CEO or equivalent management structures. <p>2: The Bidder has provided a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of 3 (below 4).</p> <p>The following requirements must be met:</p> <ul style="list-style-type: none"> The Service Management Maturity Assessment must be based on the COBIT or ITIL Framework. The report must be produced by an accredited independent assessor/auditor. The letter confirming the accreditation of independent assessor/auditor must be produced. The report must be signed by the Bidder's CFO and CEO or equivalent management structures. <p>0: The Bidder has not demonstrated that the company adheres to a best-practice Service Management framework in line with SARS's requirements.</p> <p>For Bidders with ISO certification: The ISO certification must remain valid for the contract duration.</p> <p>For Bidders with ITSM Maturity Assessment Report: the Bidder must produce an annual IT Service Management Maturity Assessment report from an accredited auditor/ assessor, signed by the CFO and CEO or equivalent management structures, confirming the</p>		4 = 5.71 2 = 2.86 0 = 0.00	15A

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			maintenance of advanced and optimised IT Service Management processes in line with SARS's requirements.		
3.2.	Service Management Toolset	<p>SARS aims to establish the level of automation of the Bidder's service-management process as a foundational element to the successful provision of IT services as stipulated in the Business Requirement Specification.</p> <p>The Bidder that can give verifiable references to confirm that the toolset used offers enough automation of its service management according to SARS's requirements will achieve maximum points for this sub-criterion.</p>	<p>4: The Bidder has demonstrated that its IT Service Management toolset/system is fully automated and well established to meet or surpass all of SARS's requirements and has provided two contactable references, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none"> • Incidents Management. • Problems Management. • Change Management. • Configuration Management. • Service level management. • Performance and Capacity management. • Service Management Reporting. <p>2: The Bidder has demonstrated that its IT Service Management toolset/system is fully automated and well prepared to meet or surpass all of SARS's requirements and has provided one contactable reference, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none"> • Incidents Management. • Problems Management. • Change Management. • Configuration Management. • Service level management. • Performance and Capacity management. • Service Management Reporting. <p>0: The Bidder has not demonstrated that its IT Service Management system is fully automated and well established to meet or surpass all of SARS's functionality needs.</p> <p>SARS reserves the right to conduct due diligence to validate the information provided.</p>	<p>4 = 4.29</p> <p>2 = 2.15</p> <p>0 = 0</p>	15B
4.	Transition Criterion			10	
4.1.	Transition Team Structure and Experience	<p>SARS aims to assess the Bidder's capability to transition the services effectively. All aspects of the transition team must be adequately detailed by the Bidder's proposal. The Bidder that presents acceptable risk in achieving the requirements will score maximum points for this criterion.</p> <p>The key inquiry is: Does the Bidder's proposal for Transition as defined in the <u>Business Requirements Specification</u> include a formally defined multidisciplinary Transition team with named and experienced key resources?</p>	<p>4: The Bidder's proposal for a Transition team structure has been formally defined and includes experienced personnel who meet all the following minimum requirements:</p> <ul style="list-style-type: none"> • All team members have experience in transitioning two projects similar in size to those stipulated by SARS. • Summary of individual experience clearly stipulating the roles in the project, minimum qualification/certification based on the below areas, and roles of the team members in previous/past transitions. • The different roles in the transition team's structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: <ul style="list-style-type: none"> ○ Transition Management. ○ Project Management/Programme Management. ○ Vendor and Contract Management. ○ IT Service Management. ○ Technical Subject Matter Experts. 	<p>4 = 2.14</p> <p>2 = 1.07</p> <p>0 = 0.00</p>	17

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			<p>2: The Bidder's proposal for a Transition team structure has been formally defined and includes personnel who meet all the following minimum requirements:</p> <p>All team members have experience in transitioning one project similar in size to SARS's.</p> <ul style="list-style-type: none"> The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience: <ul style="list-style-type: none"> Transition Management. Project Management/Programme Management. Vendor and Contract Management. IT Service Management. Technical Subject Matter Experts. <p>0: The Bidder's proposal for a Transition team structure does not meet SARS's minimum requirements.</p> <p>The Bidder may provide additional areas of expertise over and above the minimum requirements, in relation to the teams' experience which the Bidder deems key to a successful transition process.</p>		
4.2.	Organisational Transition Experience	<p>SARS aims to assess the Bidder's capability to transition the services effectively, as demonstrated by its experience of transition and the complexity of the transition projects undertaken. At least two transition projects that the Bidder has performed during its service to different clients should be described with substantiating documentation by the Bidder to be eligible to achieve maximum points.</p> <p>The key inquiry is: Is the Bidder experienced in conducting Transition Projects?</p>	<p>4: The Bidder is experienced and has conducted a successful transition of at least two projects and transformation projects, similar in size and complexity to those required by SARS.</p> <p>0: The Bidder does not show experience in conducting two successful transition projects of a similar size and complexity to SARS.</p> <p>NB: SARS reserves the right to validate all the information provided by the Bidder.</p>	<p>4 = 1.43</p> <p>0 = 0.00</p>	18A
4.3.	Transition Plan	<p>SARS aims to assess the Bidder's proposal for transitioning the services effectively. All requirements for Transitioning in the <u>Business Requirements Specification</u>, the <u>Agreement</u>, and this <u>RFP Main Document</u> must be included in the scope of the project, including the plan to meet the required timelines.</p> <p>The key inquiry is: Does the Bidder's proposal for a transition plan contain all the elements for a successful transition project?</p>	<p>4: The Bidder's proposal for a transition plan contains the following minimum requirements for a successful transition project:</p> <ul style="list-style-type: none"> Clearly stipulated stages of the transition project (e.g. Initiation, Planning, Execution, Monitoring, Closure). The Project schedule with scope, timelines, dependencies, milestones, deliverables, based on the services provided in Tower D. The schedule must also show a maximum transition period of three (3) months and recommend timelines for the network transformation. Defined Roles and Responsibilities (between SARS, the outgoing vendor, and incoming vendor). Stakeholder Engagement and Communication. Risk Management. Deployment and migration approach. Training and Knowledge Transfer. Quality assurance. Post-Transition Support and Optimisation. Transition approach: Specify how downtime and disruptions will be minimised during the transition. 	<p>4 = 2.87</p> <p>0 = 0.00</p>	17

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
			0: The Bidder's proposal for a transition plan does not meet SARS's minimum requirements for a successful transition project.		
4.4.	Security — Organisational Management Structure	<p>SARS aims to establish whether the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to an implemented ISMS. The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of the Services in this Tower.</p> <p>The Bidder will be evaluated formally on the following basis:</p> <ul style="list-style-type: none"> SARS seeks to establish the extent to which the Bidder has an approved and well-appointed organisational HR structure with specific reference to Information Security and Risk Management. <p>Bidders who have a single point of accountability regarding Information Security (formally appointed CISO/ISO or equivalent) will achieve maximum points for this criterion.</p> <p>The evidence must be provided by the Bidder's duly appointed Auditor, and the compliance letter must indicate all ISMS requirements as stipulated in the ISO 27001 framework.</p>	<p>4: The Bidder has shown an approved and <u>well-appointed</u> organisational HR structure with specific reference to Information Security and Risk Management. <u>Single accountability</u> for Information Security (formally appointed CISO/ISO or equivalent). The evidence must be provided by the Bidder's duly appointed Auditor, and the compliance letter must indicate <u>all ISMS requirements</u> as stipulated in the ISO 27001 framework.</p> <p>2: The Bidder has shown approved but <u>limited appointment</u> (acting/vacant) positions in the organisational HR structure with specific reference to Information Security and Risk Management. <u>No single accountability</u> for Information Security (no appointed CISO/ISO or equivalent). The evidence must be provided by the Bidder's duly appointed Auditor, and the compliance letter must indicate <u>partial compliance</u> as stipulated in the ISO 27001 framework.</p> <p>0: The Bidder has not shown an approved or appointed organisational structure with specific reference to Information Security and Risk Management or has demonstrated no single accountability for Information Security (no appointed CISO/ISO or equivalent).</p>	<p>4 = 0.71</p> <p>2 = 0.36</p> <p>0 = 0.00</p>	18A
4.5.	Security — Organisational Policy	<p>SARS aims to establish the Bidder's organisational approach to security management as defined within the ISO 27001 framework and with specific reference to an implemented ISMS.</p> <p>The Bidder must give as much information as possible to explain its security approach and how it will benefit SARS in the delivery of the Services in this Tower.</p> <p>The Bidder will be evaluated formally on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown its implemented ISM capability with specific reference to organisational strategy and approved Information Security Policies and Procedures (Structure) that is in line with industry standards and has been formalised within its organisation. <p>The evidence must be provided by the Bidder's duly appointed Auditor, and the compliance letter must indicate all ISMS requirements as it relates to Information Security Policies and Procedures as stipulated in the ISO 27001 framework.</p>	<p>4: The Bidder has shown its implemented ISM capability with specific reference to organisational strategy and <u>approved</u> Information Security Policies and Procedures (Structure) which are in line with industry standards and <u>have been formalised</u> within its organisation. The evidence must be provided by the Bidder's duly appointed Auditor, and the compliance letter must indicate all ISMS requirements as it relates to Information Security Policies and Procedures as stipulated in the ISO 27001 framework.</p> <p>2: The Bidder has shown its implemented ISM capability with specific reference to organisational strategy, <u>draft (non-approved)</u> Information Security Policies, or Procedures (Structure) that <u>have not been formalised</u> within its organisation. The evidence must be provided by the Bidder's duly appointed Auditor, and the compliance letter must indicate partial compliance as it relates to Information Security Policies and Procedures as stipulated in the ISO 27001 framework.</p> <p>0: The Bidder has no ISM capability, organisational strategy, or approved Information Security Policies or Procedures, nor are these formalised within its organisation.</p>	<p>4 = 0.71</p> <p>2 = 0.36</p> <p>0 = 0.00</p>	18A

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
4.6.	Information Security Control Measures	<p>SARS wants to know how the Bidder implements information-security control measures in its organisation. The Bidder must provide all relevant documentation that shows its information-security level and how it will benefit SARS in the delivery of the Services.</p> <p>The Bidder will be evaluated formally and generally on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown its approach to Information Security Control Measures being implemented including a detailed description of its solution to protect data at the Bidder's site and to transmit information to and from the Bidder's site. The description should include a detailed technical diagram indicating both physical and logical protection mechanisms including information and IT security measures (logical access control [passwords]; firewalls; intrusion prevention; anti-virus; audit capability). <p>Descriptions of appropriate safeguards (through technical controls) against the unauthorised access, destruction, loss, or alteration of SARS's confidential Information under the management of the Bidder.</p> <ul style="list-style-type: none"> Description of processes and procedures implemented to secure the Bidder's hardware and software, and to prevent unauthorised access to the Bidder's environment so as to protect the confidentiality, integrity, and non-repudiation of SARS's confidential information that is transmitted through or stored on Bidder's infrastructure. The evidence must be provided by the Bidder's duly appointed auditor, and the compliance letter must indicate all ISMS requirements as it relates to Control Measures as stipulated in the ISO 27001 framework. 	<p>4: The Bidder has shown, with substantiation, its capability to implement Information Security Control Measures. The evidence must be provided by the Bidder's duly appointed Auditor, and the compliance letter must indicate all ISMS requirements as it relates to Control Measures as stipulated in the ISO 27001 framework.</p> <p>2: The Bidder has shown its limited approach it has to Information Security Measures implemented. The evidence must be provided by the Bidder's duly appointed Auditor, and the compliance letter must indicate all ISMS requirements or partial compliance as it relates to Control Measures as stipulated in the ISO 27001 framework.</p> <p>0: The Bidder has not shown, with any substantiation, that it has implemented any Security Control Measures as stipulated in the ISO 27001 framework.</p>	<p>4 = 1.07</p> <p>2 = 0.54</p> <p>0 = 0.00</p>	19
4.7.	Security Incident Management	<p>SARS aims to establish the Bidder's management approach to Security-related incidents. The Bidder must give as much information as possible to justify its claims that its way of handling security-related incidents will benefit SARS in the delivery of this service.</p> <p>The Bidder will be evaluated formally and generally on the following basis:</p> <ul style="list-style-type: none"> The Bidder has shown that its approach to Security Incident Management complies with the ISO 27001 framework which includes Identification, Assessment, Decision, and Response to information-security events. The 	<p>4: The Bidder has shown, with substantiation, the approach it has to Security Incident Management as stipulated in the ISO 27001 framework. The evidence needs to be provided by the Bidder's duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as it relates to Security Incident Management as stipulated in the ISO 27001 framework.</p> <p>2: The Bidder has shown, with limitations, the approach it has, to Security Incident Management as stipulated in the ISO 27001 framework. The evidence needs to be provided by the Bidder's duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements or partial compliance as it relates to Security Incident Management as stipulated in the ISO 27001 framework.</p>	<p>4 = 1.07</p> <p>2 = 0.54</p> <p>0 = 0.00</p>	20

No:	Sub-criterion	Inquiry	Specific evaluation guidelines	Inquiry weighting	TRT Reference
		evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as it relates to Security Incident Management as stipulated in the ISO 27001 framework.	0: The Bidder has not shown and substantiated that it has implemented any Security Incident Management capability as stipulated in the ISO 27001 framework.		

Table 8I: Technical Evaluation Criteria for Tower V

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion		32		
1.1.	<p>Current Client Base:</p> <p>SARS aims to establish the current capability of delivering services within the scope of this Tower. Bidders that can show that they are currently delivering services within the scope of this Tower to an established client base of sufficient scale will achieve maximum points.</p> <p>Customers’ Information provided/filled in Table A of the Mandatory response template substantiating the Bidders claims, will be used to achieve maximum points.</p>	<p>3: All technical elements of scope are currently delivered by the Bidder to clients. Some only to customers more than quarter the size (>4 000 staff) of SARS. Bidder to provide 2 contactable references of clients where services have been successfully rendered within a mandatory defined period.</p> <p>2: All technical elements of scope are delivered by the Bidder to clients. Some only to customers less than quarter the size (1 500 - 4 000 staff) of SARS. Bidder to provide a contactable reference from clients where services have been successfully rendered within a mandatory defined period.</p> <p>1: All technical elements of scope are delivered by the Bidder to clients. Some only to customers less than quarter the size (<1 500 staff) of SARS. Bidder to provide a contactable reference from clients where services have been successfully rendered within a mandatory defined period.</p> <p>0: Most technical elements of scope are currently delivered by the Bidder to clients. All the services are not currently delivered by the Bidder to any clients. No contactable references are provided.</p> <p>Note to Bidders: Bidders who can show that they are currently delivering services within the scope of this Tower to an established client base of sufficient scale will achieve maximum points. Customer Information and contactable references provided substantiating the Bidder’s claims will be used to achieve maximum points.</p>	4	1.1	Complete the Technical Response Template (TRT)
1.2.	<p>Sub-contractor/ Underlying Carrier:</p> <p>SARS seeks to establish the extent to which the Bidder places reliance on third parties generally to deliver the services; the formality with which third parties have been engaged for the Bidder’s Proposal; and the track record of the Bidder working together with the particular third parties. Bidders who can show that the level of reliance on third parties and the formality with which it has engaged such third parties as sub-contractors do not pose a risk to the delivery of service to SARS will achieve maximum points for this criterion. The</p>	<p>3: All third parties engaged as part of the Bidder’s proposal have been formally engaged and the Bidder has established relationships. The Bidder relies on underlying carriers but does not subcontract voice services (inbound and outbound calls).</p> <p>2: All third parties engaged as part of the Bidder’s proposal have been formally engaged and the Bidder has established relationships. The Bidder relies on underlying carriers but subcontracts a significant (<40%) of the voice services (inbound and outbound calls).</p> <p>1: All third parties engaged as part of the Bidder’s proposal have been formally engaged and the Bidder has established relationships. The</p>	4	1.2	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	Bidder must attach documentation to substantiate its claims to achieve maximum points."	Bidder relies on underlying carriers but subcontracts a significant (40% to 70%) of the voice services (inbound and outbound calls). 0: Third parties engaged as part of the Bidder's proposal are not formally engaged and the Bidder has established relationships. The Bidder relies on underlying carriers but subcontracts a significant (>70%) of the voice services (inbound and outbound calls).			
1.3.	Bidder's Strategic Direction: SARS seeks to establish the extent to which the Bidder has a commitment to provide services based on each of the technologies listed. The Bidder's strategic direction with regard to developing new technologies and replacing older technologies must include informing SARS of enhancements to the services within this Tower. The Bidder must attach documentation to support any claims made.	3: The Bidder has a footprint in implementing SIP technology in at least 4 of the biggest Metros of South Africa. 2: The Bidder has a footprint in implementing SIP technology in at least 3 of the biggest Metros of South Africa. 1: The Bidder has a footprint in implementing SIP technology in at least 2 of the biggest Metros of South Africa. 0: The Bidder does not have any experience in implementing SIP technology in any of the major Provinces. Note to Bidders: The Bidder should describe its commitment to providing the technology, enhancements, migration to newer technologies, opportunities newer technologies may bring, cost savings, and any other information that will show opportunity for the reduction in risk.	5	1.3	Complete the Technical Response Template (TRT)
		3: The Bidder has a footprint in implementing Microsoft Teams Phone (Hosted Direct Routing) technology in at least 4 of the biggest Metros of South Africa. 2: The Bidder has a footprint in implementing Microsoft Teams Phone (Hosted Direct Routing) technology in at least 3 of the biggest Metros of South Africa. 1: The Bidder has a footprint in implementing Microsoft Teams Phone (Hosted Direct Routing) technology in at least 2 of the biggest Metros of South Africa. 0: The Bidder does not have any experience in implementing Microsoft Teams Phone (Hosted Direct Routing) technology in any of the major Provinces. Note to Bidders: The Bidder should describe its commitment to providing the technology, enhancements, migration to newer technologies, opportunities newer technologies may bring, cost savings, and any other information that will show opportunity for the reduction in risk.	5	1.3	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		<p>3: The Bidder has a footprint in implementing Hosted Voice technology in at least 4 of the biggest Metros of South Africa.</p> <p>2: The Bidder has a footprint in implementing Hosted Voice technology in at least 3 of the biggest Metros of South Africa.</p> <p>1: The Bidder has a footprint in implementing Hosted Voice technology in at least 2 of the biggest Metros of South Africa.</p> <p>0: The Bidder does not have any experience in implementing Hosted Voice technology in any of the major Provinces.</p> <p>Note to Bidders: The Bidder should describe its commitment to providing the technology, enhancements, migration to newer technologies, opportunities newer technologies may bring, cost savings, and any other information that will show opportunity for the reduction in risk.</p>	4		Complete the Technical Response Template (TRT)
1.4.	<p>Service Centres:</p> <p>SARS aims to establish the depth of skills and capabilities that the Bidder (and its sub-contractors) will bring to bear in delivering services to SARS. Bidders who can show that its existing Service Centres have sufficient coverage of required skills will achieve maximum points. SARS will consider the extent to which Service Centres that are not yet established are relied upon to provide distribution of skills.</p>	<p>3: The Bidder should have a 24/7 Service Centre with the required third-line support skills. The Bidder must provide documents with the names of the employees, including their certified skills and number of years’ experience.</p> <p>2: The Bidder has a 24/7 Service Centre but only second-line and first-line support skills. The Bidder must provide documents with the names of the employees who have technical voice experience and their certifications.</p> <p>1: The Bidder has a 24/7 Service Centre but only has first-line support skills. The Bidder must provide documents with the names of the employees who have technical voice experience and their certifications.</p> <p>0: The Bidder does not have a 24/7 Service Centre and does not have the required support skills.</p> <p>Note to Bidders: Service Centres are required in Gauteng region. The Bidder will deploy voice equipment at SARS’s Headquarters in Brooklyn (Lehae La SARS), Alberton Campus, and Doringkloof. The Bidder’s Service Centres must also serve the region where any equipment or software is deployed at the Bidder’s hosting facility or at any of the Bidder’s points of presence (POP) to deliver the requested services. Voice to all SARS branches will be routed over the Data Carrier provider’s network, prioritised as required.</p>	4	1.4	Complete the Technical Response Template (TRT)
1.5.	<p>Skills:</p> <p>SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects or operations to run from SARS’s Head Office, Alberton Campus, or Doringkloof office.</p>	<p>3: The Bidder has a minimum of five (5) skills for the Voice-Related OEM Certification (CISCO CCIE or similar with 3 Years’ Voice Experience), with no reliance on sub-contractors.</p> <p>2: The Bidder has a minimum of five (5) skills for the Voice-Related OEM Certification (CISCO CCIE or similar with 3 Years’ Voice Experience), with reliance on sub-contractors.</p> <p>1: The Bidder has a minimum of three (3) skills for the Voice-Related OEM Certification (CISCO CCIE or similar with 3 Years’ Voice Experience), with reliance or no reliance on sub-contractors.</p>	2	1.5	Complete the Technical Response Template (TRT) and provide CVs of the resource(s)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		0: The Bidder has less than of three (3) skills for the Voice-Related OEM Certification (CISCO CCIE or similar with 3 Years’ Voice Experience), with reliance or no reliance on sub-contractors.			
		3: The Bidder has a minimum of two (2) skills for the Voice Network Design and Architecture Skills (CISCO CCDA or similar with 3 Years’ Experience), with no reliance on sub-contractors.	2	1.5	Complete the Technical Response Template (TRT) and provide CVs of the resource(s)
		2: The Bidder has a minimum of two (2) skills for the Voice Network Design and Architecture Skills (CISCO CCDA or similar with 3 Years’ Experience), with reliance on sub-contractors.			
		1: The Bidder has a minimum of one (1) skill for the Voice Network Design and Architecture Skills (CISCO CCDA or similar with 3 Years’ Experience), with reliance or no reliance on sub-contractors.			
		0: The Bidder has a less than one (1) skills for the Voice Network Design and Architecture Skills (CISCO CCDA or similar with 3 Years’ Experience), with reliance or no reliance on sub-contractors.			
		3: The Bidder has a minimum of two (2) skills for the Project Management (PMBOK Certified with 3 Years’ Experience), with no reliance on sub-contractors.	2	1.5	Complete the Technical Response Template (TRT) and provide CVs of the resource(s)
		2: The Bidder has a minimum of two (2) skills for the Project Management (PMBOK Certified with 3 Years’ Experience)., with reliance on sub-contractors.			
		1: The Bidder has a minimum of one (1) skill for the Project Management (PMBOK Certified with 3 Years’ Experience), with reliance or no reliance on sub-contractors.			
		0: The Bidder has a less than one (1) skills for the Project Management (PMBOK Certified with 3 Years’ Experience), with reliance or no reliance on sub-contractors.			
2.	Technical Solution		30		
2.1.	<p>Bidder Organisation: Voice Points of Presence:</p> <p>SARS aims to establish the Bidder’s current distribution of Voice POPs, both current and planned, to be used to deliver SARS voice services. Bidders with currently established voice locations and those planned near the SARS Sites (Alberton and Doringkloof) will score maximum points for this sub-criterion.</p>	<p>3: The Bidder’s current Voice network has POPs in 100% - 70% of all SARS Sites per SARS’s site list for Tower V, including designated Voice breakouts (Alberton Campus, Brooklyn, and Doringkloof).</p> <p>2: The Bidder’s current Voice network has POPs in 69%- 50% of all SARS sites per SARS’s site list for Tower V, including designated Voice breakouts (Alberton Campus, Brooklyn, and Doringkloof).</p> <p>1: The Bidder’s current Voice network has POPs in 49%- 30% of all SARS sites per SARS’s site list for Tower V, including designated Voice breakouts (Alberton Campus, Brooklyn, and Doringkloof).</p> <p>0: The Bidder’s current Voice network has POPs in less than 30% of all SARS sites per SARS’s site list for Tower V; the Bidder has no designated Voice breakouts for Alberton Campus, Brooklyn, and Doringkloof).</p>	15	2.1	Complete the Technical Response Template (TRT)
2.2.	Interconnect to other Voice Operators:	3: The Bidder can provide proof of an agreement between the Bidder and the major voice providers (Vodacom and MTN), plus any two of the	15	2.2	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	SARS aims to establish the Bidder’s capability in delivering a complete voice solution to subscribers of all voice networks. Bidders who can show that they have direct interconnect agreements with all local voice providers will score maximum points for this criterion.	<p>following interconnect networks: Telkom, Vox Telecoms, and Liquid Technologies.</p> <p>2: The Bidder can provide proof of an agreement between the Bidder and the major voice providers (Vodacom or MTN), plus any one of the following interconnect networks: Telkom, Vox Telecoms, and Liquid Technologies.</p> <p>1: The Bidder can provide proof of an agreement between the Bidder and the major voice providers (Vodacom or MTN).</p> <p>0: The Bidder does not have any interconnect agreements with any of the voice providers.</p>			
3.	Service Management Solution		18		
3.1.	<p>Service Management Compliance/ Conformance:</p> <p>SARS aims to establish that the Bidder follows a service-management framework, and that the Bidder has implemented a set of well-defined practices and processes for IT-service management. The Bidder must demonstrate its commitment to delivering high-quality IT services and to continuously improve its service-management processes in line with SARS’s requirements.</p> <p>The Bidder will be evaluated on the following basis:</p> <p>The Bidder that has provided evidence of its ISO 20000 certification OR has provided a formal IT Service Management Maturity Assessment report indicating an overall Maturity score of 4 or higher will attain the maximum score.</p> <p>NB: For Bidders with ISO certification: The ISO certification must remain valid for the contract duration.</p> <p>NB: For Bidders with ITSM Maturity Assessment Report: the Bidder must produce an annual IT Service Management Maturity Assessment report from an accredited auditor/ assessor, signed by the CFO and CEO or equivalent management structures, confirming the maintenance of advanced and optimised IT Service Management processes in line with SARS’s requirements.</p>	<p>3: The Bidder has indicated that its organisation adheres to a best-practice Service Management framework/standard and has provided one of the following as evidence: A valid ISO 20000 certificate OR a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of 4 (four) (quantitatively managed or equivalent) or higher. Bidders that provide a Maturity Assessment report as evidence, must adhere to the following requirements:</p> <ul style="list-style-type: none">- The Service Management Maturity Assessment must be based on the COBIT or ITIL Framework- The report must be produced by an accredited independent assessor/auditor. The letter confirming the accreditation of independent assessor/auditor must be provided.- The report must be signed by the Bidder’s CFO and CEO or equivalent management structures. <p>2: The Bidder has indicated that its organisation adheres to a best-practice Service Management framework/standard and has provided one of the following as evidence: A valid ISO 20000 certificate OR a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of 3 (three) (quantitatively managed or equivalent) or higher. Bidders that provide a Maturity Assessment report as evidence, must adhere to the following requirements:</p> <ul style="list-style-type: none">- The Service Management Maturity Assessment must be based on the COBIT or ITIL Framework- The report must be produced by an accredited independent assessor/auditor. The letter confirming the accreditation of independent assessor/auditor must be provided.- The report must be signed by the Bidder’s CFO and CEO or equivalent management structures. <p>1: The Bidder has provided a formal IT Service Management Maturity Assessment report showing an overall organisational Maturity score of below 3. The following requirements must be met:</p> <ul style="list-style-type: none">- The Service Management Maturity Assessment must be based on the COBIT or ITIL Framework.- The report must be produced by an accredited independent assessor/auditor. The letter confirming the accreditation of independent assessor/auditor must be produced.- The report must be signed by the Bidder’s CFO and CEO or equivalent management structures.	2	3.1	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		0: The Bidder has not demonstrated that the company adheres to a best-practice Service Management framework in line with SARS's requirements.			
3.2.	<p>Service Management Toolset:</p> <p>SARS aims to establish the level of automation of the Bidder's service-management process as a foundational element to the successful provision of IT services as stipulated in the Business Requirement Specification.</p> <p>The Bidder that can give verifiable references to confirm that the toolset used offers enough automation of its service management according to SARS's requirements will achieve maximum points for this sub-criterion.</p>	<p>3: The Bidder has demonstrated that its IT Service Management toolset/system is fully automated and well established to meet or surpass all of SARS's requirements. The Bidder has also provided three contactable references, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none">Incidents Management.Problems Management.Change Management.Configuration Management.Service Level Management.Performance and Capacity Management.Service Management Reporting. <p>2: The Bidder has demonstrated that its IT Service Management toolset/system is fully automated and well prepared to meet or surpass all of SARS's requirements. The Bidder has also provided two contactable references, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none">Incidents Management.Problems Management.Change Management.Configuration Management.Service Level Management.Performance and Capacity Management.Service Management Reporting. <p>1: The Bidder has demonstrated that its IT Service Management toolset/system is fully automated and well prepared to meet or surpass all of SARS's requirements. The Bidder has also provided one contactable reference, confirming details of full system automation in the following domains:</p> <ul style="list-style-type: none">Incidents Management.Problems Management.Change Management.Configuration Management.Service Level Management.Performance and Capacity Management.Service Management Reporting. <p>0: The Bidder has not demonstrated that its IT Service Management system is fully automated and well established to meet or surpass all of SARS's functionality needs.</p> <p>SARS reserves the right to conduct a due diligence to ensure validity of provided information.</p>	4	3.2	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
3.3.	<p>Bidder’s Solution for Monitoring and Reporting Portal (All Voice Proposals):</p> <p>SARS aims to assess the Bidder’s solution for effectiveness in achieving the specifications as set out in the Business Requirements Specification. A solution that adequately fulfils all aspects of the requirements listed above and which presents little or no risk to SARS will score maximum points for this criterion.</p>	3: The Bidder’s Solution for Monitoring and Reporting Portal: Real-time (or near real-time with no longer than 10 minutes’ delayed updating).	2		Complete the Technical Response Template (TRT).
		2: The Bidder’s Solution for Monitoring and Reporting Portal: Real-time (or near real-time with no longer than 15 minutes’ delayed updating)			
		1: The Bidder’s Solution for Monitoring and Reporting Portal: Real-time (or near real-time with no longer than 20 minutes’ delayed updating)			
		0: The Bidder’s Solution for Monitoring and Reporting Portal: Real-time (or near real-time with longer than 20 minutes’ delayed updating)			
		3: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet all the requirements for the Bidder’s Monitoring and Reporting Portal: Reports of all outages.	2	3.3	Complete the Technical Response Template (TRT).
		2: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet most of the requirements for the Bidder’s Monitoring and Reporting Portal: Reports of all outages.			
		1: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet some of the requirements for the Bidder’s Monitoring and Reporting Portal: Reports of all outages.			
		0: The Bidder has not been able to show that its current solution or a clear and committed plan to deliver the functionality required and to meet some or all of the requirements for the Bidder’s Monitoring and Reporting Portal: Reports of all outages.			
		3: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet all the requirements for the Bidder’s Monitoring and Reporting Portal: Reports of all events not repaired with the Service Levels.	2	3.3	Complete the Technical Response Template (TRT).
		2: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet most of the requirements for the Bidder’s Monitoring and Reporting Portal: Reports of all events not repaired with the Service Levels.			
		1: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet some of the requirements for the Bidder’s Monitoring and Reporting Portal: Reports of all events not repaired with the Service Levels.			
		0: The Bidder has not been able to show that its current solution or a clear and committed plan to deliver the functionality required and to meet some or all of the requirements for the Bidder’s Monitoring and Reporting Portal: Reports of all events not repaired with the Service Levels.			
		3: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet all the requirements for the Bidder’s Monitoring and Reporting Portal: Problem trends.	2	3.3	Complete the Technical Response Template (TRT).

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		<p>2: The Bidder has shown its current solution or a clear and committed plan to deliver the functionality required and to meet most of the requirements for the Bidder’s Monitoring and Reporting Portal: Problem trends.</p> <p>1: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet some of the requirements for the Bidder’s Monitoring and Reporting Portal: Problem trends.</p> <p>0: The Bidder has not been able to show that its current solution or a clear and committed plan to deliver the functionality required and to meet some or all of the requirements for the Bidder’s Monitoring and Reporting Portal: Problem trends.</p>			
		<p>3: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet all the requirements for the Bidder’s Monitoring and Reporting Portal: Utilisation trends.</p> <p>2: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet most of the requirements for the Bidder’s Monitoring and Reporting Portal: Utilisation trends.</p> <p>1: The Bidder has shown that its current solution or a clear and committed plan to deliver the functionality required and to meet some of the requirements for the Bidder’s Monitoring and Reporting Portal: Utilisation trends.</p> <p>0: The Bidder has not been able to show its current solution or a clear and committed plan to deliver the functionality required and to meet some or all of the requirements for the Bidder’s Monitoring and Reporting Portal: Utilisation trends.</p>	2	3.3	Complete the Technical Response Template (TRT).
		<p>3: The Bidder has shown its current solution or a clear and committed plan to deliver the functionality required and to meet all the requirements for the Bidder’s Ad-hoc Daily Call Volume Reports to be submitted when requested.</p> <p>2: The Bidder has shown its current solution or a clear and committed plan to deliver the functionality required and to meet most of the requirements for the Bidder’s Ad-hoc Daily Call Volume Reports to be submitted when requested.</p> <p>1: The Bidder has shown its current solution or a clear and committed plan to deliver the functionality required and to meet some of the requirements for the Bidder’s Ad-hoc Daily Call Volume Reports, to be submitted when requested.</p> <p>0: The Bidder has not been able to show its current solution or a clear and committed plan to deliver the functionality required and to meet some or all of the requirements for the Bidder’s Ad-hoc Daily Call Volume Reports to be submitted when requested.</p>	2	3.3	Complete the Technical Response Template (TRT).

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
4.	Transition Criterion		20		
4.1.	<p>Transition Team Structure and Experience:</p> <p>SARS aims to assess the Bidder’s capability to transition the services effectively. The Bidder that explains all aspects of the transition team listed above and poses least risk to SARS will score maximum points for this criterion.</p> <p>The key inquiry is: Does the Bidder’s proposal for Transition as defined in the Business Requirements Specification include a formally defined multidisciplinary Transition team with named and experienced key resources?</p>	<p>3: The Bidder’s proposal for a Transition team structure has been formally defined and includes experienced personnel who meet all the minimum requirements:</p> <p>All team members have experience in transitioning three projects similar in size to SARS’s requirements.</p> <p>Summary of individual experience clearly stipulating the roles in the project, minimum qualification/certification based on the areas below, and roles of team members in previous/past transitions.</p> <p>The different roles in the transition team’s structure should fulfil the following areas of expertise at a minimum, supported by relevant experience:</p> <ul style="list-style-type: none">• Transition Management.• Project Management/Programme Management.• Vendor and Contract Management.• IT Service Management.• Technical Subject Matter Experts. <p>2: The Bidder’s proposal for a Transition team structure has been formally defined and includes personnel who meet all the f minimum requirements:</p> <p>Each team member has experience in transitioning two project similar in size to those required by SARS.</p> <p>The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience:</p> <ul style="list-style-type: none">• Transition Management.• Project Management/Programme Management.• Vendor and Contract Management.• IT Service Management.• Technical Subject Matter Experts. <p>1: The Bidder’s proposal for a Transition team structure has been formally defined and includes personnel who meet all the minimum requirements:</p> <p>Each team member has experience in transitioning one project similar in size to those required by SARS.</p> <p>The different roles in the transition team structure should fulfil the following areas of expertise at a minimum, supported by relevant experience:</p> <ul style="list-style-type: none">• Transition Management.• Project Management/Programme Management.• Vendor and Contract Management.• IT Service Management.• Technical Subject Matter Experts.	4	4.1	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		<p>0: The Bidder’s proposal for a Transition team structure does not meet SARS’s minimum requirements.</p> <p>The Bidder may provide additional areas of expertise over and above the minimum requirements, in relation to the teams’ experience which they deem key to a successful transition process.</p>			
4.2.	<p>Transition Plan:</p> <p>SARS aims to assess the Bidder’s proposal for transitioning the services effectively. All requirements for Transitioning in the Business Requirements Specification, the Agreement, and this RFP Main Document must be included in the scope of the project, including the plan to meet the required timelines.</p> <p>The key inquiry is: Does the Bidder’s proposal for a transition plan contain all the elements for a successful transition?"</p>	<p>3: The Bidder’s proposal for a transition plan contains the following minimum requirements for a successful transition project as outlined below:</p> <p>Clearly stipulated stages of the transition project (e.g. Initiation, Planning, Execution, Monitoring, Closure).</p> <p>The Project schedule with scope, timelines, dependencies, milestones, and deliverables, based on the services provided in Tower V and showing a maximum transition period of 3 months. The Bidder must also recommend timelines for the network transformation.</p> <ul style="list-style-type: none">• Defined Roles and Responsibilities (between SARS, the outgoing vendor, and incoming vendor).• Stakeholder Engagement and Communication.• Risk Management.• Deployment and Migration Approach.• Training and Knowledge Transfer.• Quality Assurance.• Post-Transition Support and Optimisation.• Transition Approach: Specify how downtime and disruptions will be minimised during the transition. <p>2: The Bidder’s proposal for a transition plan contains the following minimum requirements for a successful transition project as outlined below:</p> <p>Clearly stipulated stages of the transition project (e.g. Initiation, Planning, Execution, Monitoring, Closure).</p> <p>The Project schedule with scope, timelines, dependencies, milestones, and deliverables, based on the services provided in Tower V and showing a maximum transition period of 4 months. The Bidder must also recommend timelines for the network transformation.</p> <ul style="list-style-type: none">• Defined Roles and Responsibilities (between SARS, the outgoing vendor, and incoming vendor).• Stakeholder Engagement and Communication.• Risk Management.• Deployment and Migration Approach.• Training and Knowledge Transfer.• Quality Assurance.• Post-Transition Support and Optimisation.• Transition Approach: Specify how downtime and disruptions will be minimised during the transition.	4	4.2	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		<p>1: The Bidder’s proposal for a transition plan contains the following minimum requirements for a successful transition project as outlined below:</p> <p>Clearly stipulated stages of the transition project (e.g. Initiation, Planning, Execution, Monitoring, Closure).</p> <p>The Project schedule with scope, timelines, dependencies, milestones, and deliverables, based on the services provided in Tower V and showing a maximum transition period of 6 months. The Bidder must also recommend timelines for the network transformation.</p> <ul style="list-style-type: none">Defined Roles and Responsibilities (between SARS, the outgoing vendor, and incoming vendor).Stakeholder Engagement and Communication.Risk Management.Deployment and Migration Approach.Training and Knowledge Transfer.Quality Assurance.Post-Transition Support and Optimisation.Transition Approach: Specify how downtime and disruptions will be minimised during the transition. <p>0: The Bidder’s proposal for a transition plan does not meet SARS’s minimum requirements for a successful transition project</p>			
4.3.	<p>Security — Organisational Management Structure:</p> <p>SARS aims to establish the Bidder’s organisational approach to security management as defined within the ISO 27001 framework and with specific reference to an implemented ISMS.</p> <p>The Bidder must give as much information as possible to show its security approach and how it will benefit SARS in the delivery of the Services in this Tower.</p> <p>The Bidder will be evaluated formally on the following basis:</p> <p>SARS seeks to establish the extent to which the Bidder has an approved and well-appointed organisational HR structure with specific reference to Information Security and Risk management.</p> <p>Bidders who have a single point of accountability regarding Information Security (formal appointed CISO/ISO or equivalent) will achieve maximum points for this criterion.</p> <p>The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter</p>	<p>3: The Bidder has shown an approved and 100% well-appointed organisational HR structure with specific reference to Information Security and Risk management. Single point of accountably for Information Security (formally appointed CISO/ISO or equivalent). The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as stipulated in the ISO 27001 framework.</p> <p>2: The Bidder has an approved appointment (acting/vacant) position of between 70% to 99% in the organisational HR structure with specific reference to Information Security and Risk Management. No single point of accountability for Information Security (no appointed CISCO/ISO or equivalent). The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate partial compliance as stipulated in the ISO 27001 framework.</p> <p>1: The Bidder has an approved but less than 70% appointment (acting/vacant) positions in the organisational HR structure with specific reference to Information Security and Risk Management. No single point of accountability for Information Security (no appointed CISCO/ISO or equivalent). The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate partial compliance as stipulated in the ISO 27001 framework.</p> <p>0: The Bidder has not shown an approved or appointed organisational structure with specific reference to Information Security and Risk</p>	3	4.3	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	needs to indicate all ISMS requirements as stipulated in the ISO 27001 framework.	Management or has no single point of accountability for Information Security (no appointed CISO/ISO or equivalent).			
4.4.	<p>Security — Organisational Policy:</p> <p>SARS aims to establish the Bidder’s organisational approach to security management as defined within the ISO 27001 framework and with specific reference to an implemented ISMS.</p> <p>The Bidder must give as much information as possible to explain its security approach and how it will benefit SARS in the delivery of the Services in this Tower. The Bidder will be evaluated formally on the following basis:</p> <p>The Bidder has shown its implemented ISM capability with specific reference to organisational strategy and approved Information Security Policies and Procedures (Structure) that are in line with industry standards, and which have been formalised within its organisation.</p> <p>The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as it relates to Information Security Policies and Procedures as stipulated in the ISO 27001 framework.</p>	<p>3: The Bidder has shown 100% of its implemented ISM capability with specific reference to organisational strategy and approved Information Security Policies and Procedures (Structure) that are in line with industry standards, and which have been formalised within its organisation. The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as it relates to Information Security Policies and Procedures as stipulated in the ISO 27001 framework.</p> <p>2: The Bidder has shown more than 80% of its implemented ISM capability with specific reference to organisational strategy, draft (non-approved) Information Security Policies, or Procedures (Structure) that have not been formalised within its organisation. The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate partial compliance as it relates to Information Security Policies and Procedures as stipulated in the ISO 27001 framework.</p> <p>1: The Bidder has shown less than 80% of its implemented ISM capability with specific reference to organisational strategy, draft (non-approved) Information Security Policies, or Procedures (Structure) that have been formalised within its organisation. The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate partial compliance as it relates to Information Security Policies and Procedures as stipulated in the ISO 27001 framework.</p> <p>0: The Bidder has no ISM capability, organisational strategy, or approved Information Security Policies or Procedures, nor are these formalised within its organisation.</p>	3	4.4	Complete the Technical Response Template (TRT)
4.5.	<p>Information Security Control Measure:</p> <p>SARS wants to know how the Bidder implements information-security control measures in its organisation. The Bidder must provide all relevant documentation that shows its information-security level and how it will benefit SARS in the delivery of the Services.</p> <p>The Bidder will be evaluated formally and generally on the following basis:</p> <p>The Bidder has shown its approach to Information Security Control Measures being implemented, including a detailed description of its solution regarding the protection of data at the Bidder’s site and the transmission of information to and from the Bidder’s site. The description should include a detailed technical diagram indicating both physical and logical protection mechanisms including information and IT-security measures (logical access control [passwords]; firewalls; intrusion prevention; anti-virus; audit capability).</p>	<p>3: The Bidder has shown, with substantiation, its capability to implement Information Security Control Measures. The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as it relates to Control Measures as stipulated in the ISO 27001 framework.</p> <p>2: The Bidder has shown a reasonable approach towards the capability to implement Information Security Measures. The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements or partial compliance as it relates to Control Measures as stipulated in the ISO 27001 framework.</p> <p>1: The Bidder has shown a limited approach towards the capability to implement Information Security Measures. The evidence needs to be provided by the Bidder’s duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements or partial compliance as it relates to Control Measures as stipulated in the ISO 27001 framework.</p> <p>0: The Bidder has not shown and substantiated that it has implemented any Security Control Measures as stipulated in the ISO 27001 framework.</p>	3	4.5	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	<p>Descriptions of appropriate safeguards (through technical controls) against the unauthorised access, destruction, loss, or alteration of SARS's confidential information under the management of the Bidder.</p> <p>Description of processes and procedures implemented to secure the Bidder's hardware and software, and to prevent unauthorised access to the Bidder's environment to protect the confidentiality, integrity, and non-repudiation of SARS's confidential information that is transmitted through or stored on Bidder's infrastructure. The evidence needs to be provided by the Bidder's duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as it relates to Control Measures as stipulated in the ISO 27001 framework.</p>				
4.6.	<p>Security Incident Management:</p> <p>SARS aims to establish the Bidder's management approach to Security-related incidents. The Bidder must give as much information as possible to justify its claims that its way of handling security-related incidents will benefit SARS in the delivery of this service.</p> <p>The Bidder will be evaluated formally and generally on the following basis:</p> <p>The Bidder has shown its approach to Security Incident Management as stipulated in the ISO 27001 framework, which includes Identification, Assessment, Decision, and Response to information-security events.</p> <p>The evidence needs to be provided by the Bidder's duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as it relates to Security Incident Management as stipulated in the ISO 27001 framework.</p>	<p>3: The Bidder has shown, with substantiation, the approach it has to Security Incident Management as stipulated in the ISO 27001 framework. The evidence needs to be provided by the Bidder's duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements as it relates to Security Incident Management as stipulated in the ISO 27001 framework.</p> <p>2: The Bidder has shown, a reasonable approach to Security Incident Management as stipulated in the ISO 27001 framework. The evidence needs to be provided by the Bidder's duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements or partial compliance as it relates to Security Incident Management as stipulated in the ISO 27001 framework.</p> <p>1: The Bidder has shown, a limited approach to Security Incident Management as stipulated in the ISO 27001 framework. The evidence needs to be provided by the Bidder's duly appointed Auditor, and the compliance letter needs to indicate all ISMS requirements or partial compliance as it relates to Security Incident Management as stipulated in the ISO 27001 framework.</p> <p>0: The Bidder has not shown and substantiated that it has implemented any Security Incident Management capability as stipulated in the ISO 27001 framework.</p>	3	4.6	Complete the Technical Response Template (TRT)

Table 8J: Technical Evaluation Criteria for Tower C, Category A [SMS, USSD, Short Message, MMS, Short URL Link Carrier Solution]

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion Evaluation				
1.1.	Direct Links to Mobile Network Operators		20		
1.1.	<p>Infrastructure Architectural Diagram & Description. Show the following components on your diagram and provide a description of each of the components below:</p> <ul style="list-style-type: none"> • IPSEC • VPN • Firewalls • Encryption • South Africa based data centres • Redundancy • Underlying carriers • Single points of failure • Links to MNOs. <p>SARS aims to establish the Bidder's current capability to deliver SMS, USSD, MMS, and short URL messages across secure links to mobile operators (MOs).</p> <p>A Bidder must demonstrate that it is currently carrying SMS traffic directly to all South African MNOs. The Bidder will be required to provide a confirmation letter from each mobile network operator.</p>	<p>3: The bidder has provided a high-level infrastructure architectural diagram that clearly shows the components (datacentres, servers, networks, security layers, cell phone towers, handsets) of the SMS, USSD, MMS, short messages and shortened URL solution proposed. It must show the links to each of the components mentioned below from IPSEC to Data centres. Each component must be described in as much details as necessary. Confirmation letters from each of the MNOs is attached</p> <p>2: Two or less components are not included in the diagram or descriptions of the components are insufficient The MNO letters are attached.</p> <p>1: More than two components are not included in the diagram or descriptions of the components are insufficient. The MNO letters are attached.</p> <p>0: The bidder has not provided all the details required. The letters from the MNOs are not attached.</p>	20	1	Complete the Technical Response Template (TRT) & provide an Infrastructure Architectural Diagram & Description
2	Skills & Experience				
2.1	Skills		10		
2.1.1.	<p>Account Manager - Technical account management skills (minimum of 3 years' project-management and ITSM experience and ITIL Foundation or COBIT 5 certification).</p> <p>SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects/assignments run from SARS's head office, or at SARS sites nationwide. A Bidder who can show sufficient coverage of all technical-skill categories available for such assignments will be eligible to achieve maximum points for this sub-criterion.</p>	<p>3: Resource has 3+ years' experience, relevant documentation is provided (CV) and holds ITIL Foundation or COBIT 5 certification. Demonstrates added value (e.g., advanced ITSM knowledge, leadership in similar projects).</p> <p>2: Resource has at least 3 years' experience and relevant documentation is provided (CV) but lacks ITIL Foundation or COBIT 5 certification.</p> <p>1: Resource has some relevant experience but less than 3 years, or documentation is incomplete or unclear.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV, certifications) is provided.</p>	4	2	Complete the Technical Response Template (TRT) and provide a CV
2.1.2.	Technical Resources – Network engineer, Firewall, testing resource, communication solution design	3: Resources have 5+ years' experience with full documentation (CV) and demonstrate relevant experience.	6	2	Complete the Technical

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	and MQ or architecture skills - minimum of 5 years' experience (it is permissible for one resource to cover different roles).	<p>2: Resources have 3–4 years' experience with full documentation (CV, relevant experience).</p> <p>1: Resources have 3–4 years' experience, but documentation is incomplete or lacks clarity.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV) is provided.</p>			Response Template (TRT) and provide a CV
3	Technical Solution Criterion				
3.1.	SMS, USSD, Short Message, MMS, Short URL Link Carrier Solution		40		
3.1.1.	<p>Application Architecture: SMS, USSD, Short Message, MMS, Short URL link Carrier Solution.</p> <p>SARS seeks information to establish whether the Bidder has a fully developed and operational message-carrier solution that will meet SARS's integrated message-carrier-service requirements. Bidders who propose a full solution with no single points of failure will receive maximum points for this criterion. The Bidder must provide an architectural diagram specifying the components (SMS, USSD, Short Message, MMS, Short URL) of the solution, including a published API specification. The Bidder must also include the protocol supported (SMPP, SOAP-WS, Restful WS). A policy document stating how patches will be managed must be provided.</p>	<p>3: The bidder has provided a high-level application architecture diagram & detailed description of the full message carrying solution (SMS, USSD, Short Message, MMS, Short URL) with links to the architecture diagram</p> <p>2: The bidder has provided a high-level application architecture diagram & detailed description of the full message carrying solution with one or two components missing.</p> <p>1: The bidder has provided a high-level application architecture diagram & detailed description of the full message carrying solution with more than two components missing.</p> <p>0: The bidder has not provided the diagram, or the descriptions of all the required components</p>	19	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.2.	Patch Policy, Timelines & Communication	<p>3: The bidder has provided their Patch Deployment Policy, a timeline for the next year, and the communication protocol to be used to inform SARS in advance of any patches being deployed.</p> <p>2: The bidder has not specified one of the above components.</p> <p>1: The bidder has not specified more than one of the above components.</p> <p>0: The bidder has not provided any of the required details.</p>	3	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.3.	SMS Delivery process	<p>3: The bidder has provided the SMS Delivery process description and diagram clearly showing the sequence of events during delivery of an SMS from the SARS core system to the taxpayer's handset and delivery confirmation back to SARS.</p> <p>2: One of the requirements have not been met</p> <p>1: More than one of the requirements have not been met</p> <p>0: The bidder has not provided any of the required details.</p>	3	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.4.	USSD Delivery process	<p>3: The bidder has provided the USSD Delivery process description and diagram clearly showing the sequence of events during processing of a USSD session from the taxpayer to and from SARS core systems.</p> <p>2: One of the requirements have not been met</p>	3	3	Complete the Technical Response Template (TRT) and provide an

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		1: More than one of the requirements have not been met 0: The bidder has not provided any of the required details.			Application Architecture
3.1.5.	MMS Delivery process	3: The bidder has provided the MMS Delivery process description and diagram clearly showing the sequence of events during delivery of an MMS from the SARS core system to the taxpayer's handset and delivery confirmation back to SARS 2: One of the requirements have not been met 1: More than one of the requirements have not been met 0: The bidder has not provided any of the required details.	3	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.6.	Short message URL (e.g. bit.ly) delivery process	3: The bidder has provided the short message URL (e.g. bit.ly) Delivery process description and diagram clearly showing the sequence of events during delivery of an SMS that contains a shortened URL and the taxpayer retrieving the message. Special emphasis to be placed on the security components for these transactions. 2: One of the requirements have not been met 1: More than one of the requirements have not been met 0: The bidder has not provided any of the required details.	3	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.7.	Published API that supports SMPP, SOAP, Restful, SMTP	3: The bidder has provided the published API specification that clearly shows that it supports SMPP, SOAP, REST and SMTP. 2: One of the requirements have not been met 1: More than one of the requirements have not been met 0: The bidder has not provided any of the required details.	3	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.8.	Scalability - Scalability in the application layer refers to the ability of an application to handle increasing amounts of load, users, data, or other resources without experiencing a significant decrease in performance or reliability	3: The bidder has provided the details that shows the scalability (horizontal & vertical scaling of infrastructure, servers, network, firewalls, load balancers, efficient algorithms, multi-threaded application design and code) of the Service Providers solution for SARS to understand the limits that the design place on SARS volumes. 2: One of the requirements have not been met 1: More than one of the requirements have not been met 0: The bidder has not provided any of the required details.	3	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
4	Service Management Solution Criterion				
4.1.	Service Management Maturity and Toolset Assessment		10		
4.1.1.	Comprehensive maturity assessments and toolset capabilities for: <ul style="list-style-type: none"> • Problem Management, • Incident Management • Service Request Management 	3: The bidder has provided comprehensive maturity assessments and toolset capabilities for all management areas. 2: The bidder has provided maturity assessments and toolset capabilities with one or two missing requirements	10	4	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	<ul style="list-style-type: none">•Release Management•Change Management,• Event Management• Knowledge Management <p>SARS aims to ensure that the Bidder has both the necessary processes and tools to effectively manage and support all critical Service Management areas.</p>	<p>1: The bidder has provided maturity assessments and toolset capabilities with three or more missing requirements</p> <p>0: The bidder has not provided any of the required details for the management areas</p>			
4.2.	Bidder’s Solution for Monitoring and Reporting (M&R) Portal		10		
4.2.1.	<p>Bidder’s Solution for Monitoring and Reporting (M&R) Portal including:</p> <ul style="list-style-type: none">• Infrastructure & Application, Architecture diagram & Description• Platform/ Access• Delivery method• Delivery Status Information• Near Real time monitoring• Ad Hoc reporting <p>SARS aims to assess the Bidder’s solution for its effectiveness in achieving the specifications as set out in the Business Requirements Specification. A Bidder must provide a high-level infrastructure & application architectural diagram of its monitoring and reporting tool. The solution should contain functionality to deal with near real-time monitoring of all relevant aspects of the channel (SMS, USSD, short messages, shortened URL), including circuits to the MOs, capacity utilisation of critical elements, and queue status. Additionally, the service provider must provide up-to-date monthly statistics for all in-scope elements of the SMS carrier services over the term of the agreement, including traffic volumes, incidents and problems, and a breakdown of volumes per channel. A Bidder must provide monitoring tools to analyse the outbound transactions to detect unusual usage and ensure reconciliation of invoices to SARS data. Real-time (or near-real-time) with no longer than 10 minutes’ delayed updating.</p>	<p>3: The bidder has provided a solution which fully meets all specified requirements.</p> <p>2: The Bidder has provided a solution with one or two missing requirements.</p> <p>1: The Bidder has provided a solution with three or more missing requirements.</p> <p>0: The bidder has not provided any of the required details for the M&R solution</p>	10	4	Complete the Technical Response Template (TRT)
5	Transition		10		
5.1	<p>Transition Team</p> <p>SARS aims to assess the Bidder’s capability to transition the services effectively. All aspects of the transition team (team structure, escalation, key personnel, experience, & related qualifications) must be adequately explained by the Bidder’s proposal, supported by relevant documentation (CV’s) and it must present acceptable risk in achieving the requirements to</p>				

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	score maximum points for this criterion. The key inquiry is: Does the Bidder’s proposal for transition include a formally defined transition team with these key roles Project manager, Network engineer, Firewall resource, Testing resource and MQ engineer. It is permissible for a resource to cover multiple roles.				
5.1.1.	Transition Team	<p>3: The proposal defines a transition team with named personnel covering All key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided.</p> <p>2: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided.</p> <p>1: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are NOT provided.</p> <p>0: The proposal lacks a formally defined transition team. No named personnel, roles, or supporting documentation (e.g. CVs) are provided.</p>	6	5	Complete the Technical Response Template (TRT)
5.2.	<p>Transition Plan</p> <p>SARS aims to assess the Bidder’s proposal for transitioning the services effectively. All requirements for transitioning must be included in the scope of the project:</p> <ul style="list-style-type: none">• Technical changes on SARS & Service Provider platforms – Ensure compatibility and readiness of both SARS and the new Service Provider ‘s platforms• Changeover – Execute switch from the current Service Provider to the new one, and disengage the current provider				
5.2.1.	Transition Plan	<p>3: The proposal includes all required elements: technical changes, changeover, testing, and rollback. Each component is described with sufficient detail and supported by documentation. Risk mitigated.</p> <p>2: The proposal includes a basic transition plan but is missing one or two key components (e.g. rollback strategy or testing procedures). Limited detail or documentation. Risk to service continuity is medium.</p> <p>1: The proposal includes a basic transition plan but is missing three or more key components (e.g. rollback strategy, changeover strategy or testing procedures). Limited detail or documentation. Risk to service continuity is high.</p> <p>0: The proposal lacks a transition plan or omits critical elements such as technical changes, changeover, testing, or rollback. No evidence of planning or risk mitigation.</p>	4	5	Complete the Technical Response Template (TRT)

Table 8K: Technical Evaluation Criteria for Tower C, Category B [Email Equipment Services Solution]

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion Evaluation				
1.1.	Direct Secure Redundant Links to Email Service Providers		20		
1.1.	<p>Infrastructure Architectural Diagram & Description. Show the following components on your diagram and provide a description of each of the components below:</p> <ul style="list-style-type: none"> • IPSEC • VPN • Firewalls • Encryption • South Africa based data centres • Redundancy • Underlying carriers • Single points of failure <p>SARS aims to establish the Bidder's current capability to deliver bulk email messages across secure links to email service providers.</p> <p>A Bidder must demonstrate that it is currently carrying bulk emails directly to all South African citizens.</p>	<p>3: The bidder has provided a high-level infrastructure architectural diagram that clearly shows the components (datacentres, servers, networks, security layers) of the mail solution proposed. It must show the links to each of the components mentioned below from IPSEC to Data centres. Each component must be described in as much details as necessary.</p> <p>2: As above for 3 but some (2 or less) components are not included in the diagram or descriptions of the components are insufficient</p> <p>1: As above for 2 but most (more than 2) components are not included in the diagram or descriptions of the components are insufficient.</p> <p>0: The bidder has not provided all the details required.</p>	20	1	Complete the Technical Response Template (TRT) & provide an Infrastructure Architectural Diagram & Description
2	Skills & experience				
2.1	Skills		10		
2.1.1.	<p>Account Manager - Technical account management skills (minimum of 3 years' project-management and ITSM experience and ITIL Foundation or COBIT 5 certification).</p> <p>SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects/assignments run from SARS's head office, or at SARS sites nationwide. A Bidder who can show sufficient coverage of all technical-skill categories available for such assignments will be eligible to achieve maximum points for this sub-criterion.</p>	<p>3: Resource has 3+ years' experience, relevant documentation is provided (CV) and holds ITIL Foundation or COBIT 5 certification. Demonstrates added value (e.g., advanced ITSM knowledge, leadership in similar projects).</p> <p>2: Resource has at least 3 years' experience and relevant documentation is provided (CV) but lacks ITIL Foundation or COBIT 5 certification.</p> <p>1: Resource has some relevant experience but less than 3 years', or documentation is incomplete or unclear.</p> <p>0: No resource meets the minimum 3 years experience, or no relevant documentation (e.g., CV, certifications) is provided.</p> <p>At least one (1) resource (may be subcontracted) with three (3) years' experience with relevant documentation (the Bidder must provide a Curriculum Vitae (CV) of the resource(s)).</p> <p>0: Resources with less than three (3) years' experience or with no relevant documentation.</p>	4	2	Complete the Technical Response Template (TRT) and provide a CV
2.1.2.	Technical Resources – Network engineer, Firewall, testing resource, communication solution design and MQ or architecture skills - minimum of 5	3: Resources have 5+ years' experience with full documentation (CV) and demonstrate relevant experience.	6	2	Complete the Technical Response

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	years' experience (it is permissible for one resource to cover different roles).	<p>2: Resources have 3–4 years' experience with full documentation (CV, relevant experience).</p> <p>1: Resources have 3–4 years' experience, but documentation is incomplete or lacks clarity.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV) is provided.</p>			Template (TRT) and provide a CV
3	Technical Solution Criterion				
3.1.	Bulk Email Service Capability		40		
3.1.1.	<p>High level application architectural diagram and detailed description provided</p> <p>SARS is seeking information to establish whether the Bidder has a fully developed and operational bulk email-message carrier solution which will meet SARS's email-message-carrier service requirements. Bidders that propose a full solution with no single points of failure will receive maximum points for this criterion. The Bidder is expected to provide an architectural diagram specifying the components of the solution, including a published API specification. It must also include the protocol supported: Simple Mail Transfer Protocol (SMTP).</p>	<p>3: The bidder has provided an application high level architectural diagram and clearly shows the components of the email solution proposed. It must show the links to each of the components mentioned below from direct links to Email Service Provider through to subcontractors.</p> <p>2: The bidder has provided a high-level architectural diagram or shows the components of the email solution proposed.</p> <p>1: The bidder has provided some, but not all the items required</p> <p>0: The bidder has not provided a high-level architectural diagram and does not show the components of the email solution proposed.</p>	20	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.2.	Patch Policy, Timelines & Communication	<p>3: The bidder has provided their Patch Deployment Policy, a timeline for the next year, and the communication protocol to be used to inform SARS in advance of any patches being deployed.</p> <p>2: The bidder has not specified one of the above components.</p> <p>1: The bidder has not specified more than one of the above components.</p> <p>0: The bidder has not provided any of the details required.</p>	5	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.3.	Bulk Email Delivery process	<p>3: The bidder has provided the Email Delivery process description, diagram clearly showing the sequence of events during delivery of an email from the SARS core system to the taxpayer and delivery confirmation back to SARS.</p> <p>2: One of the requirements have not been met</p> <p>1: More than one of the requirements have not been met</p> <p>0: The bidder has not provided any of the required details.</p>	5	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.4.	Email authentication protocols	<p>3: The bidder has provided the details that shows the email authentication protocols (Sender Policy Framework (SPF), DomainKeys Identified Mail (DKIM), and Domain-based Message Authentication, Reporting & Conformance (DMARC).</p> <p>2: The bidder has provided at least two details but not all of the email authentication protocols.</p>	5	3	Complete the Technical Response Template 5(TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		1: The bidder has provided at most 2 of the email authentication protocols. 0: The bidder has not provided any of the required details.			
3.1.5.	Access controls	3: The bidder has provided the details that shows all the email access controls. (Access Control Models, Policies and Rules and Access Control Lists (ACLs)). 2: The bidder has provided the details that shows the two email access controls. 1: The bidder has provided the details that shows only one of the email access controls. 0: The bidder has not provided any of the required details.	5	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
4	Service Management Solution Criterion				
4.1.	Service Management Maturity and Toolset Assessment		10		
4.1.1.	Comprehensive maturity assessments and toolset capabilities for: <ul style="list-style-type: none">• Problem Management,• Incident Management• Service Request Management•Release Management•Change Management,• Event Management• Knowledge Management SARS aims to ensure that the Bidder has both the necessary processes and tools to effectively manage and support all critical Service Management areas.	3: The bidder has provided comprehensive maturity assessments and toolset capabilities for all management areas. 2: The bidder has provided maturity assessments and toolset capabilities with one or two missing requirements. 1: The bidder has provided maturity assessments and toolset capabilities with three or more missing requirements. 0: The bidder has not provided any of the required details for the management areas.	10	4	Complete the Technical Response Template (TRT)
4.2.	Bidder’s Solution for Monitoring and Reporting (M&R) Portal		10		
4.2.1.	Bidder’s Solution for Monitoring and Reporting (M&R) Portal including: <ul style="list-style-type: none">• Infrastructure & Application, Architecture diagram & Description• Platform/ Access• Delivery method• Delivery Status Information• Near Real time monitoring• Ad Hoc reporting SARS aims to assess the Bidder’s solution for its effectiveness in achieving the specifications as set out in the Business Requirements Specification. A Bidder must provide a high-level	3: The bidder has provided a solution which fully meets all specified requirements. 2: The Bidder has provided a solution with one or two missing requirements. 1: The Bidder has provided a solution with three or more missing requirements. 0: The bidder has not provided any of the required details for the M&R solution.	10	4	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	infrastructure & application architectural diagram of its monitoring and reporting tool. The solution should contain functionality to deal with near real-time monitoring of all relevant aspects of the channel (SMS, USSD, short messages, shortened URL), including circuits to the MOs, capacity utilisation of critical elements, and queue status. Additionally, the service provider must provide up-to-date monthly statistics for all in-scope elements of the SMS carrier services over the term of the agreement, including traffic volumes, incidents and problems, and a breakdown of volumes per channel. A Bidder must provide monitoring tools to analyse the outbound transactions to detect unusual usage and ensure reconciliation of invoices to SARS data. Real-time (or near-real-time) with no longer than 10 minutes’ delayed updating.				
5	Transition		10		
5.1	Transition Team SARS aims to assess the Bidder’s capability to transition the services effectively. All aspects of the transition team (team structure, escalation, key personnel, experience, & related qualifications) must be adequately explained by the Bidder’s proposal, supported by relevant documentation (CV’s) and it must present acceptable risk in achieving the requirements to score maximum points for this criterion. The key inquiry is: Does the Bidder’s proposal for transition include a formally defined transition team with these key roles Project manager, Network engineer, Firewall resource, Testing resource and MQ engineer. It is permissible for a resource to cover multiple roles.				
5.1.1.	Transition Team	3: The proposal defines a transition team with named personnel covering All key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided. 2: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided. 1: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are NOT provided. 0: The proposal lacks a formal defined transition team. No named personnel, roles, or supporting documentation (e.g. CVs) are NOT provided.	6	5	Complete the Technical Response Template (TRT)
5.2.	Transition Plan SARS aims to assess the Bidder’s proposal for transitioning the services effectively. All requirements for transitioning must be included in the scope of the project: <ul style="list-style-type: none">Technical changes on SARS & Service Provider platforms – Ensure compatibility and readiness of both SARS and the new Service Provider’s platformsChangeover – Execute switch from the current Service Provider to the new one, and disengage the current provider				
5.2.1.	Transition Plan	3: The proposal includes all required elements: technical changes, changeover, testing, and rollback. Each component is described with sufficient detail and supported by documentation. Risk mitigated.	4	5	Complete the Technical

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		<p>2: The proposal includes a basic transition plan but is missing one or two key components (e.g. rollback strategy or testing procedures). Limited detail or documentation. Risk to service continuity is medium.</p> <p>1: The proposal includes a basic transition plan but is missing three or more key components (e.g. rollback strategy, changeover strategy or testing procedures). Limited detail or documentation. Risk to service continuity is high.</p> <p>0: The proposal lacks a transition plan or omits critical elements such as technical changes, changeover, testing, or rollback. No evidence of planning or risk mitigation.</p>			Response Template (TRT)

Table 8L: Technical Evaluation Criteria for Tower C, Category C [PRINTED LETTERS SOLUTION]

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion Evaluation				
1.1.	Direct Links to between SARS and Service Provider to be created		20		
1.1.	<p>Infrastructure Architectural Diagram & Description. Show the following components on your diagram and provide a description of each of the components below:</p> <ul style="list-style-type: none"> • IPSEC • VPN • Firewalls • Encryption • South Africa based data centres • Redundancy • Underlying carriers • Single points of failure <p>SARS aims to establish the Bidder's current capability to deliver printed letters to taxpayers via SAPO.</p> <p>A Bidder must demonstrate that it is currently printing and distributing printed letters in South Africa.</p>	<p>3: The bidder has provided a high-level infrastructure architectural diagram that clearly shows the components (datacentres, servers, networks, security layers) of the mail solution proposed. It must show the links to each of the components mentioned below from IPSEC to Data centres. Each component must be described in as much details as necessary.</p> <p>2: As above for 3 but some (2 or less) components are not included in the diagram or descriptions of the components are insufficient</p> <p>1: As above for 2 but most (more than 2) components are not included in the diagram or descriptions of the components are insufficient.</p> <p>0: The bidder has not provided all the required details.</p>	20	1	Complete the Technical Response Template (TRT) & provide an Infrastructure Architectural Diagram & Description
2	Skills & Experience				
2.1	Skills		10		

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
2.1 .1.	<p>Account Manager - Technical account management skills (minimum of 3 years’ project-management and ITSM experience and ITIL Foundation or COBIT 5 certification).</p> <p>SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects/assignments run from SARS’s head office, or at SARS sites nationwide. A Bidder who can show sufficient coverage of all technical-skill categories available for such assignments will be eligible to achieve maximum points for this sub-criterion.</p>	<p>3: Resource has 3+ years’ experience, relevant documentation is provided (CV) and holds ITIL Foundation or COBIT 5 certification. Demonstrates added value (e.g., advanced ITSM knowledge, leadership in similar projects).</p> <p>2: Resource has at least 3 years’ experience and relevant documentation is provided (CV) but lacks ITIL Foundation or COBIT 5 certification.</p> <p>1: Resource has some relevant experience but less than 3 years, or documentation is incomplete or unclear.</p> <p>0: No resource meets the minimum 3 years’ experience, or no relevant documentation (e.g., CV, certifications) is provided.</p> <p>At least one (1) resource (may be subcontracted) with three (3) years’ experience with relevant documentation (the Bidder must provide a Curriculum Vitae (CV) of the resource(s)).</p> <p>0: Resources with less than three (3) years’ experience or with no relevant documentation.</p>	4	2	Complete the Technical Response Template (TRT) and provide a CV
2.1.2.	<p>Technical Resources – Network engineer, Firewall, testing resource, communication solution design and MQ or architecture skills - minimum of 5 years’ experience (it is permissible for one resource to cover different roles).</p>	<p>3: Resources have 5+ years’ experience with full documentation (CV) and demonstrate relevant experience.</p> <p>2: Resources have 3–4 years’ experience with full documentation (CV, relevant experience).</p> <p>1: Resources have 3–4 years’ experience, but documentation is incomplete or lacks clarity.</p> <p>0: No resource meets the minimum 3 years’ experience, or no relevant documentation (e.g., CV) is provided.</p>	6	2	Complete the Technical Response Template (TRT) and provide a CV
3	Technical Solution Criterion				
3.1.	Printed Letters Solution		40		
3.1.1.	<p>High level application architectural diagram and detailed description provided</p> <p>SARS is seeking information to establish whether the Bidder has a developed printed letters solution that will meet SARS’s printed letters-solution requirements. Bidders that propose a full solution with no single points of failure will receive maximum points for this criterion. The Bidder is expected to provide an architectural diagram specifying the components of the solution, including a published API specification. It must also include the protocol supported (MQ).</p>	<p>3: The bidder has provided an application high level architectural diagram and clearly shows the components of the printed letters solution proposed. It must show the links to each of the components mentioned below from direct links to Email Service Provider through to subcontractors.</p> <p>2: The bidder has provided a high-level architectural diagram or shows the components of the proposed email solution.</p> <p>1: The bidder has provided some, but not all the items required</p> <p>0: The bidder has not provided a high-level architectural diagram and does not show the components of the proposed email solution.</p>	20	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.2.	<p>Patch Policy, Timelines & Communication</p>	<p>3: The bidder has provided their Patch Deployment Policy, a timeline for the next year, and the communication protocol to be used to inform SARS in advance of any patches being deployed.</p> <p>2: The bidder has not specified one of the above components.</p>	5	3	Complete the Technical Response Template (TRT) and provide an

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		1: The bidder has not specified more than one of the above components. 0: The bidder has not provided any of the required details.			Application Architecture
3.3.	Printed Letter Delivery process	3: The bidder has provided the Printed Letter Delivery process description, diagram clearly showing the sequence of events during delivery of an email from the SARS core system to the taxpayer and delivery confirmation back to SARS. 2: One of the requirements have not been met. 1: More than one of the requirements have not been met. 0: The bidder has not provided any of the required details.	15	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
4	Service Management Solution Criterion				
4.1.	Service Management Maturity and Toolset Assessment		10		
4.1.1.	Comprehensive maturity assessments and toolset capabilities for: <ul style="list-style-type: none">• Problem Management• Incident Management• Service Request Management•Release Management•Change Management• Event Management• Knowledge Management SARS aims to ensure that the Bidder has both the necessary processes and tools to effectively manage and support all critical Service Management areas.	3: The bidder has provided comprehensive maturity assessments and toolset capabilities for all management areas. 2: The bidder has provided maturity assessments and toolset capabilities with one or two missing requirements. 1: The bidder has provided maturity assessments and toolset capabilities with three or more missing requirements. 0: The bidder has not provided any of the required details for the management areas.	10	4	Complete the Technical Response Template (TRT)
4.2.	Bidder’s Solution for Monitoring and Reporting (M&R) Portal		10		
4.2.1.	Bidder’s Solution for Monitoring and Reporting (M&R) Portal including: <ul style="list-style-type: none">• Infrastructure & Application, Architecture diagram & Description• Platform/ Access• Delivery Method• Delivery Status Information• Near Real Time Monitoring• Ad Hoc Reporting SARS aims to assess the Bidder’s solution for its effectiveness in achieving the specifications as set out in the Business Requirements Specification. A Bidder must provide a high-level infrastructure & application architectural	3: The bidder has provided a solution which fully meets all specified requirements. 2: The Bidder has provided a solution with one or two missing requirements. 1: The Bidder has provided a solution with three or more missing requirements. 0: The bidder has not provided any of the required details for the M&R solution.	10	4	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	diagram of its monitoring and reporting tool. The solution should contain functionality to deal with near real-time monitoring of all relevant aspects of the channel (SMS, USSD, short messages, shortened URL), including circuits to the MOs, capacity utilisation of critical elements, and queue status. Additionally, the service provider must provide up-to-date monthly statistics for all in-scope elements of the SMS carrier services over the term of the agreement, including traffic volumes, incidents and problems, and a breakdown of volumes per channel. A Bidder must provide monitoring tools to analyse the outbound transactions to detect unusual usage and ensure reconciliation of invoices to SARS data. Real-time (or near-real-time) with no longer than 10 minutes’ delayed updating.				
5	Transition		10		
5.1	Transition Team SARS aims to assess the Bidder’s capability to transition the services effectively. All aspects of the transition team (team structure, escalation, key personnel, experience, & related qualifications) must be adequately explained by the Bidder’s proposal, supported by relevant documentation (CV’s) and it must present acceptable risk in achieving the requirements to score maximum points for this criterion. The key inquiry is: Does the Bidder’s proposal for transition include a formally defined transition team with these key roles Project manager, Network engineer, Firewall resource, Testing resource and MQ engineer. It is permissible for a resource to cover multiple roles.				
5.1.1.	Transition Team	3: The proposal defines a transition team with named personnel covering All key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided. 2: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided. 1: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are NOT provided. 0: The proposal lacks a formal defined transition team. No named personnel, roles, or supporting documentation (e.g. CVs) are NOT provided.	6	5	Complete the Technical Response Template (TRT)
5.2.	Transition Plan SARS aims to assess the Bidder’s proposal for transitioning the services effectively. All requirements for transitioning must be included in the scope of the project: <ul style="list-style-type: none">Technical changes on SARS & Service Provider platforms – Ensure compatibility and readiness of both SARS and the new Service Provider’s platformsChangeover – Execute switch from the current Service Provider to the new one, and disengage the current provider				
5.2.1.	Transition Plan	3: The proposal includes all required elements: technical changes, changeover, testing, and rollback. Each component is described with sufficient detail and supported by documentation. Risk mitigated.	4	5	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		<p>2: The proposal includes a basic transition plan but is missing one or two key components (e.g. rollback strategy or testing procedures). Limited detail or documentation. Risk to service continuity is medium.</p> <p>1: The proposal includes a basic transition plan but is missing three or more key components (e.g. rollback strategy, changeover strategy or testing procedures). Limited detail or documentation. Risk to service continuity is high.</p> <p>0: The proposal lacks a transition plan or omits critical elements such as technical changes, changeover, testing, or rollback. No evidence of planning or risk mitigation.</p>			

Table 8M: Technical Evaluation Criteria for Tower C, Category D [Future Social Media, Live Chat & AI/LLM Carrier Solution]

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
1.	Capability Criterion Evaluation				
1.1.	Direct Links to Operators		20		
1.1.1.	<p>Infrastructure Architectural Diagram & Description. Show the following components on your diagram and provide a description of each of the components below:</p> <ul style="list-style-type: none">IPSECVPNFirewallsEncryptionSouth Africa based data centresRedundancyUnderlying carriersSingle points of failure <p>SARS aims to establish the Bidder’s current capability for delivering future social media, live chat, AI/LLM or similar services across secure to the “operator” (Meta/other).</p> <p>A Bidder must demonstrate that it is currently carrying the service traffic directly to the South African based entity interfacing into the “operator” (Meta/other).</p>	<p>3: The bidder has provided a high-level infrastructure architectural diagram that clearly shows the components (datacentres, servers, networks, security layers) of the mail solution proposed. It must show the links to each of the components mentioned below from IPSEC to Data centres. Each component must be described in details.</p> <p>2: As above for 3 but some (2 or less) components are not included in the diagram or descriptions of the components are insufficient</p> <p>1: As above for 2 but most (more than 2) components are not included in the diagram or descriptions of the components are insufficient.</p> <p>0: The bidder has not provided all the required details.</p>	20	1	Complete the Technical Response Template (TRT) & provide an Infrastructure Architectural Diagram & Description
2	Skills & Experience				

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
2.1	Skills		10		
2.1.1.	<p>Account Manager - Technical account management skills (minimum of 3 years' project-management and ITSM experience and ITIL Foundation or COBIT 5 certification).</p> <p>SARS aims to establish the depth of skills that the Bidder (including its sub-contractors) will offer to SARS, if required by SARS, for projects/assignments run from SARS's head office, or at SARS sites nationwide. A Bidder who can show sufficient coverage of all technical-skill categories available for such assignments will be eligible to achieve maximum points for this sub-criterion.</p>	<p>3: Resource has 3+ years' experience, relevant documentation is provided (CV) and holds ITIL Foundation or COBIT 5 certification. Demonstrates added value (e.g., advanced ITSM knowledge, leadership in similar projects).</p> <p>2: Resource has at least 3 years' experience and relevant documentation is provided (CV) but lacks ITIL Foundation or COBIT 5 certification.</p> <p>1: Resource has some relevant experience but less than 3 years, or documentation is incomplete or unclear.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV, certifications) is provided.</p>	4	2	Complete the Technical Response Template (TRT) and provide a CV
2.1.2.	<p>Technical Resources – Network engineer, Firewall, testing resource, communication solution design and MQ or architecture skills - minimum of 5 years' experience (it is permissible for one resource to cover different roles).</p>	<p>3: Resources have 5+ years' experience with full documentation (CV) and demonstrate relevant experience.</p> <p>2: Resources have 3–4 years' experience with full documentation (CV, relevant experience).</p> <p>1: Resources have 3–4 years' experience, but documentation is incomplete or lacks clarity.</p> <p>0: No resource meets the minimum 3 years' experience, or no relevant documentation (e.g., CV) is provided.</p>	6	2	Complete the Technical Response Template (TRT) and provide a CV
3	Technical Solution Criterion				
3.1.	Future Social Media Channels, Live Chat and AI/LLM Carrier Solution		40		
3.1.1.	<p>Application Architecture: Future channel Carrier Solution.</p> <p>SARS is seeking information to establish whether the Bidder has a developed message-carrier solution that will meet SARS's message-carrier service requirements. Bidders that propose a full solution with no single points of failure will receive maximum points for this criterion. The Bidder is expected to provide an architectural diagram specifying the components of the solution, including a published API specification. It must also include the protocol supported (SMPP, SOAP, REST).</p>	<p>3: The bidder has provided a high-level application architecture diagram & detailed description of the full future channel carrying solution (social media, Live chat, AI/LLM) with links to the architecture diagram.</p> <p>2: One component cannot be provided.</p> <p>1: More than one component cannot be provided.</p> <p>0: The bidder has not provided the diagram, or the descriptions of all required components.</p>	20	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.2.	Patch Policy, Timelines & Communication	<p>3: The bidder has provided their Patch Deployment Policy, a timeline for the next year, and the communication protocol to be used to inform SARS in advance of any patches being deployed.</p> <p>2: The bidder has not specified one of the above components.</p> <p>1: The bidder has not specified more than one of the above components.</p>	5	3	Complete the Technical Response Template (TRT) and provide an Application Architecture

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
		0: The bidder has not provided any of the required details.			
3.1.3.	Future requirement, social media, AI/Live chat Delivery process	3: The bidder has provided the future requirement Delivery process description and diagram clearly showing the sequence of events during delivery of a future message from the SARS core system to the taxpayer’s device and delivery confirmation back to SARS. 2: One of the requirements have not been met. 1: More than one of the requirements have not been met. 0: The bidder has not provided any of the required details.	10	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
3.1.4.	Published API that supports SMPP, SOAP, Restful, SMTP	3: The bidder has provided the published API specification that clearly shows that it supports SMPP, SOAP, REST and SMTP. 2: One of the requirements have not been met. 1: More than one of the requirements have not been met 0: The bidder has not provided any of the required details.	5	3	Complete the Technical Response Template (TRT) and provide an Application Architecture
4	Service Management Solution Criterion				
4.1.	Service Management Maturity and Toolset Assessment		10		
4.1.1.	Comprehensive maturity assessments and toolset capabilities for: • Problem Management • Incident Management • Service Request Management •Release Management •Change Management • Event Management • Knowledge Management SARS aims to ensure that the Bidder has both the necessary processes and tools to effectively manage and support all critical Service Management areas.	3: The bidder has provided comprehensive maturity assessments and toolset capabilities for all management areas. 2: The bidder has provided maturity assessments and toolset capabilities with one or two missing requirements. 1: The bidder has provided maturity assessments and toolset capabilities with three or more missing requirements. 0: The bidder has not provided any of the required details for the management areas.	10	4	Complete the Technical Response Template (TRT)
4.2.	Bidder’s Solution for Monitoring and Reporting (M&R) Portal		10		
4.2.1.	Bidder’s Solution for Monitoring and Reporting (M&R) Portal including: • Infrastructure & Application, Architecture diagram & Description • Platform/ Access • Delivery method • Delivery Status Information • Near Real Time Monitoring • Ad Hoc Reporting	3: The bidder has provided a solution which fully meets all specified requirements. 2: The Bidder has provided a solution with one or two missing requirements. 1: The Bidder has provided a solution with three or more missing requirements. 0: The bidder has not provided any of the required details for the M&R solution	10	4	Complete the Technical Response Template (TRT)

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
	SARS aims to assess the Bidder’s solution for its effectiveness in achieving the specifications as set out in the Business Requirements Specification. A Bidder must provide a high-level infrastructure & application architectural diagram of its monitoring and reporting tool. The solution should contain functionality to deal with near real-time monitoring of all relevant aspects of the channel (SMS, USSD, short messages, shortened URL), including circuits to the MOs, capacity utilisation of critical elements, and queue status. Additionally, the service provider must provide up-to-date monthly statistics for all in-scope elements of the SMS carrier services over the term of the agreement, including traffic volumes, incidents and problems, and a breakdown of volumes per channel. A Bidder must provide monitoring tools to analyse the outbound transactions to detect unusual usage and ensure reconciliation of invoices to SARS data. Real-time (or near-real-time) with no longer than 10 minutes’ delayed updating.				
5	Transition		10		
5.1	Transition Team SARS aims to assess the Bidder’s capability to transition the services effectively. All aspects of the transition team (team structure, escalation, key personnel, experience, & related qualifications) must be adequately explained by the Bidder’s proposal, supported by relevant documentation (CV’s) and it must present acceptable risk in achieving the requirements to score maximum points for this criterion. The key inquiry is: Does the Bidder’s proposal for transition include a formally defined transition team with these key roles Project manager, Network engineer, Firewall resource, Testing resource and MQ engineer. It is permissible for a resource to cover multiple roles.				
5.1.1.	Transition Team	3: The proposal defines a transition team with named personnel covering all key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided. 2: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are provided. 1: The proposal defines a transition team with named personnel covering some key roles (Project Manager, Network Engineer, Firewall Resource, Testing Resource, MQ Engineer). CVs are NOT provided. 0: The proposal lacks a formal defined transition team. No named personnel, roles, or supporting documentation (e.g. CVs) are NOT provided.	6	5	Complete the Technical Response Template (TRT)
5.2.	Transition Plan SARS aims to assess the Bidder’s proposal for transitioning the services effectively. All requirements for transitioning must be included in the scope of the project: <ul style="list-style-type: none">Technical changes on SARS & Service Provider platforms – Ensure compatibility and readiness of both SARS and the new Service Provider’s platformsChangeover – Execute switch from the current Service Provider to the new one, and disengage the current provider				

No:	Technical Evaluation Criteria	Scoring Criteria	Weight (Points)	Technical Reference Template (TRT) Reference	Evidence to be submitted
5.2.1.	Transition Plan	<p>3: The proposal includes all required elements: technical changes, changeover, testing, and rollback. Each component is described with sufficient detail and supported by documentation. Risk mitigated.</p> <p>2: The proposal includes a basic transition plan but is missing one or two key components (e.g. rollback strategy or testing procedures). Limited detail or documentation. Risk to service continuity is medium.</p> <p>1: The proposal includes a basic transition plan but is missing three or more key components (e.g. rollback strategy, changeover strategy or testing procedures). Limited detail or documentation. Risk to service continuity is high.</p> <p>0: The proposal lacks a transition plan or omits critical elements such as technical changes, changeover, testing, or rollback. No evidence of planning or risk mitigation.</p>	4	5	Complete the Technical Response Template (TRT)

8.5 Price and B-BBEE/Specific Goals Evaluation (Gate 3)

- 8.5.1 In line with the requirements of the Preferential Procurement Policy Framework Act, 2000 (Act 5 of 2000) and its Regulations, and SARS's Preferential Procurement Policy, only Bidders who have met or exceeded the minimum threshold for functionality in the technical evaluation, will be evaluated further.
- 8.5.2 SARS will apply the relevant preference point system in accordance with the published preference point system. Should the actual pricing proposals submitted by the Bidders differ from the estimated costs which prescribe the system to be used, the lowest acceptable tender will be used to determine the applicable preference point system.

Table 8N: Price and B-BBEE/Specific Goals Evaluation

No:	Criteria	Points
1.	Price	90
2.	Specific goals	10
TOTAL		100

8.5.3 Price Evaluation (Gate 3, Stage 1)

- 8.5.3.1 Points for the price evaluation will be calculated in accordance with the formula stated below.
- 8.5.3.2 Bidders must complete all line-items in the pricing response template(s) provided by SARS, which will be used for the price evaluation. 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 or bill of quantities may cause the Bidder to score zero for the pricing evaluation or to be disqualified.

Table 8O: Pricing Evaluation Formula

Price evaluation formula	Points
$Ps = 90 \left(1 - \frac{Pt - Pmin}{Pmin} \right)$	90

- 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

8.5.4 B-BBEE/Specific Goals Evaluation (Gate 3, Stage 2)

- 8.5.4.1 Points for the B-BBEE/specific goals evaluation will be allocated in accordance with a Bidder's size and ownership per table 1 (on pages 4–5) of the SBD 6.1 Preference Points Claim Form. Points for specific goals can be awarded only to a Bidder that submits a valid B-BBEE certificate, affidavit, share certificate of the company, or CIPC registration documents, together with the SBD 6.1 Preference Points Claim Form.
- 8.5.4.2 **Bidders should refer to the SBD 6.1 Preference Points Claim Form in terms of the Preferential Procurement Regulations 2022, for the specific goals and points to be claimed for this RFP.**
- 8.5.4.3 Bidders who do not claim preference points will be scored zero for B-BBEE/specific goals.
- 8.5.4.4 Failure of a Bidder to submit the required documentation to support claiming the preference points for specific goals together with the proposal, will be interpreted to mean that preference points for specific goals are not claimed.
- 8.5.4.5 The B-BBEE certificate or affidavit should be submitted in the name of the bidding entity. If the proposal is submitted by an incorporated JV, the incorporated JV must submit its B-BBEE status-level verification certificate or affidavit. If the proposal is submitted by an unincorporated JV/consortium, the unincorporated JV/consortium must submit a consolidated B-BBEE certificate or affidavit as if they were a group structure. Such a consolidated B-BBEE certificate or affidavit must be prepared for every separate proposal.
- 8.5.4.6 SARS reserves the right to request Bidders to submit proof of any information to substantiate claims made about their B-BBEE status/size.

Table 8P: Specific Goals Evaluation Points Allocation

Specific goals evaluation criteria	Points
Bidders to submit: a) A duly completed SBD 6.1 Preference Point Claim Form b) A valid B-BBEE certificate or affidavit c) CIPC registration documentation	10

8.5.4.7 The following table indicates the specific B-BBEE documents that must be submitted for this RFP.

Table 8Q: B-BBEE Documents Checklist

No:	Classification	Turnover	Submission requirement
1.	Exempted Micro Enterprise (EME)	Less than R10 million p.a.	<ul style="list-style-type: none"> An affidavit or certificate from CIPC.
2.	Qualifying Small Enterprise (QSE)	From R10 million and R50 million p.a.	<ul style="list-style-type: none"> An affidavit (only 51% black ownership and above); or A copy of B-BBEE rating certificate from an agency accredited by the South African National Accreditation System (SANAS).
3.	Large Enterprise (LE)	More than R50 million p.a.	<ul style="list-style-type: none"> A copy of B-BBEE rating certificate from a SANAS-accredited rating agency.

8.5.5 Consolidation of Price and Specific Goals Evaluation (Gate 4)

8.5.5.1 The points scored by a Bidder for the price evaluation and the 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 specific goals evaluation and ranking of the Bidders.

8.6 Financial Risk Analysis

8.6.1 SARS may conduct a financial risk analysis on the Bidders, and SARS has the right not to make an award to a Bidder(s) if its risk analysis indicates a high risk.

8.6.2 The Bidders must 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 be either audited or independently reviewed in accordance with the public interest score (PIS) in compliance with the Companies Act 2008 (Act 71 of 2008). Bidders must submit the PIS in compliance with the Companies Act. The annual financial statements must contain:

8.6.2.1 A statement of profit and loss and other comprehensive income;

8.6.2.2 A statement of financial position;

8.6.2.3 A statement of cash flows;

8.6.2.4 A statement of changes in equity/net assets; and

8.6.2.5 Accompanying notes.

8.6.3 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.

8.6.4 Bidders who have been trading for fewer than three (3) financial periods must provide:

8.6.4.1 A letter detailing this fact, signed by a duly authorised representative of the entity;

8.6.4.2 The annual financial statements that the entity can provide, considering the period that it has been trading; and

8.6.4.3 Any other information or documentation that will clarify the Bidder's financial history.

8.6.5 SARS reserves the right to request further information regarding the annual financial statements of a Bidder at any point to demonstrate the potential Bidder's financial capability. This information will include:

8.6.5.1 Holding company's/parent company's accounts;

8.6.5.2 Management accounts;

8.6.5.3 Signed letter from a recognised financial institution confirming capital availability and bank statements; and

8.6.5.4 Credit-rating reports (confirming capital availability or access to capital).

8.6.6 If a Bidder is a subsidiary company and it submits the holding company's financial statements for financial analysis, the holding company must furnish a performance guarantee that is signed by a financial service provider (guarantor) of the holding company. The performance guarantee must state that the guarantor will undertake to cover any or all risks associated with a Bidder if the Bidder is awarded the RFP.

8.6.7 If the proposal is submitted by an incorporated JV, it must submit its annual financial statements. If the proposal is submitted by an unincorporated JV/consortium, it must submit annual financial statements of each of the parties to the arrangement.

8.6.8 SARS reserves the right to request a financial guarantee from the recommended Bidder(s) prior to award, based on the financial risk-evaluation outcome.

8.7 **Recommended Bidders' Due Diligence and Risk Assessment prior to Award**

8.7.1 SARS has a legal and moral obligation to ensure that a supplier's financial position does not place

public money or services at unacceptable risk. SARS will perform due diligence and assess the risk of recommended Bidder(s) prior to award.

- 8.7.2 As part of due diligence and risk assessment, the Bidder must ensure that the Bidder is complying with all regulatory prescripts — including industry regulations specific to the commodity/services SARS is procuring — that are applicable to this tender. The Bidder must also have adopted ethical business practices. SARS has the right to request evidence of this compliance from the Bidder, and third parties, to perform due diligence and for audit or contracting arrangements.
- 8.7.3 If a due-diligence exercise reveals that a recommended Bidder does not comply with SARS's risk appetite or compliance requirements, then SARS has the right not to make an award to the recommended Bidder.
- 8.7.4 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.

8.8 **Proposed Legal Agreement**

- 8.8.1 Any award made to a Bidder under this RFP is conditional, among other provisions, upon SARS and the Bidder's concluding a written agreement within twenty-one (21) working days of SARS's receipt of Bidder's written acceptance of the award. The timeous finalisation of such an agreement will be an absolute pre-condition to the recommended Bidder's or Bidders' being awarded the tender and providing the goods or services to SARS.
- 8.8.2 If the recommended Bidder(s) fails to sign the proposed agreement within the timeframe stipulated, SARS reserves the right to:
 - 8.8.2.1 Cancel the award to the recommended Bidder;
 - 8.8.2.2 Negotiates with the second ranked Bidder(s) (based on the consolidation of price and specific goals) for that Tower and to conclude the proposed agreement with such second-ranked Bidder(s). If the second highest-ranked Bidder fails to sign the proposed agreement within the timeframe stipulated, SARS will enter into negotiations with the third-ranked Bidder(s) (based on the consolidation of price and specific goals) for that Tower; or
 - 8.8.2.3 Take any other action SARS deems reasonable and appropriate.
- 8.8.3 Mark-ups/comments:
 - 8.8.3.1 Bidders may submit mark-ups/comments on the terms and conditions of this agreement, its schedules, appendices, and attachments. Each comment or amendment must be

explained. All changes or amendments to the agreement must be in an easily identifiable font colour and tracked for ease of reference. SARS reserves the right to accept or reject any such mark-ups or comments.

Mark-up/comments will **NOT** be acceptable with regard to the following clauses:

- 8.8.3.1.1 Confidentiality
- 8.8.3.1.2 Data protection/data-protection agreement
- 8.8.3.1.3 SARS oath/affirmation of secrecy
- 8.8.3.1.4 Tax compliance
- 8.8.3.1.5 Audit rights
- 8.8.3.1.6 B-BBEE
- 8.8.3.1.7 Vetting (integrity and security competence)
- 8.8.3.1.8 Limitation of liability
- 8.8.3.1.9 Insurance
- 8.8.3.1.10 Performance bond
- 8.8.3.1.11 Records retention

8.8.4 Upon award, SARS and the successful Bidder will conclude the agreement which regulates the specific terms and conditions applicable to the goods and services being procured by SARS. In this regard:

- 8.8.4.1 SARS will enter into negotiations with the successful Bidder to conclude the agreement.
- 8.8.4.2 SARS will be entitled to cease negotiating with a successful Bidder if SARS, in its sole discretion, is of the opinion that: (i) the successful Bidder has made misrepresentations in its proposal; (ii) the successful Bidder is attempting to withdraw from positions or commitments made in its proposal; (iii) the successful Bidder is not negotiating in good faith; or (iv) prospects of the agreement are not being expeditiously concluded with the successful Bidder for any other reason.
- 8.8.4.3 SARS reserves the right to vary the terms and conditions of the proposed agreement during the negotiations with a successful Bidder at SARS's sole discretion.
- 8.8.4.4 SARS reserves the right to accept or reject any or all amendments or additions proposed by

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

- 8.8.5 A Bidder should note that the terms of its proposal will be incorporated in the proposed 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 an agreement with the successful Bidder. Therefore, any misrepresentations in a proposal may result in legal action or other processes by SARS against a Bidder, notwithstanding the conclusion of an agreement between SARS and the Bidder for the provision of the goods and services in question. In the event of a conflict between the Bidder's proposal and the agreement concluded between the parties, the agreement will prevail.

NB: For Tower C — Category B to D — SARS will issue a General Contract of Conditions as part of the Tender pack and later issue the draft panel agreement and the terms and conditions thereof which shall take precedence. SARS will issue a draft panel agreement only to the Bidders that qualify to be appointed to the panel. The Bidders will then be allowed to make mark-ups in that panel agreement subject to paragraph 8.8.3 above.

8.9 **Performance Bond**

- 8.9.1 Service Providers will post on the Effective Date, a performance bond ("**Performance Bond**") by a financial institution approved by SARS and in the form prescribed by SARS or, if SARS does not prescribe a form, in a form proposed by Service Provider and approved by SARS at its sole discretion. Notwithstanding the generality of the above, such Performance Bond will secure Service Providers' obligations in an amount equal to:

[Note to the Bidder:

For Tower D, the Performance Bond will be R5 700 000.00 (Five million seven hundred thousand rand) awarded to the Bidder.

For Tower V, the Performance Bond for both, the preferred Outbound and Preferred Inbound (Smart Access) will be R2 900 000.00 (Two Million Nine Hundred Thousand Rand) awarded to the Bidder. For Tower V, the Performance Bond for preferred Outbound will be R2 100 000.00 (Two Million One Hundred Thousand Rand) awarded to the Bidder and For Tower V, the Performance Bond for preferred inbound will be R800 000.00 (Eight Hundred Thousand Rand) awarded to the Bidder

- 8.9.2 **For Tower C, the Performance Bond for the SMS will be R2 700 000 (Two million seven hundred thousand Rand) awarded to the Bidder and the Performance Bond for the USSD will be R800 000.00**

(Eight Hundred Thousand Rand)] SARS will be entitled to make a claim for payment from the Performance Bond if:

- 8.9.2.1 The Service Provider materially breaches this Agreement, and the breach is reasonably capable of being remedied and the Service Provider fails to remedy such breach within 30 (thirty) days of being called upon by SARS to do so;
 - 8.9.2.2 The breach is not capable of being remedied;
 - 8.9.2.3 If an event occurs in respect of which this Agreement permits SARS to recover a penalty or similar service credit from the Service Provider and the Service Provider fails to pay such penalty when it is due in terms of this Agreement; and/or
 - 8.9.2.4 The Service Provider is placed under provisional or final liquidation; placed under judicial management; enters into an arrangement with its creditors; or the Service Provider enters into business rescue procedures under Chapter 6 of the Companies Act 2008 (Act No. 71 of 2008).
 - 8.9.2.5 To avoid doubt, any claim that SARS may be entitled to make under the Performance Bond will be subject to (i) the indemnities and limitations of liability contained in clauses 23 and 24 of the SARS RFP 04-2025 4-1 Network Carrier and Infrastructure Services Agreement, and (ii) the Performance Bond claims-procedure contained in this clause 8.9.
- 8.9.3 The Service Provider will not be absolved of any of its obligations and liabilities under this Agreement by virtue of its having furnished the Performance Bond.
- 8.9.4 If SARS intends to encash the Performance Bond, it must demand, on 15 days' written notice, payment from the Service Provider, specifying:
- 8.9.4.1 the cause of the claim, and
 - 8.9.4.2 the amount claimed.
- 8.9.5 If the Service Provider fails to make payment per SARS's demand in clause 8.9.4 or fails to lodge a dispute in accordance with clause 27 of the SARS RFP 04-2025 4-1 Network Carrier and Infrastructure Services Agreement within 15 (fifteen) days of receipt of SARS's notice, in accordance with clause 8.9.4 SARS will be entitled to encash the Performance Bond with immediate effect.
- 8.9.6 If SARS encashes the Performance Bond in terms of clause 8.9.2 , SARS will be entitled to recover from the proceeds of the Performance Bond all of (i) SARS's Losses occasioned by the Service

Provider; (ii) all amounts for which the Service Provider is liable in terms of any indemnities given by it to SARS; (iii) all penalties which SARS is entitled to impose upon the Service Provider; (iv) all legal costs which SARS is entitled to recover from Service Provider in asserting SARS's rights under this Agreement and the Performance Bond; and (v) any other amounts which may be owing by the Service Provider to SARS, of whatever nature and however arising; provided always that the provisions of this clause 8.9.6 will never be construed as in any way limiting SARS's right of recovery to the full value of the Performance Bond.

8.9.7 If SARS:

8.9.7.1 Cancels the Agreement pursuant to any matter referred to in clause 8.9.2, after SARS has recovered all amounts which may be owing to SARS by Service Provider in terms of clause 8.9.6, SARS will pay the balance, if any, to Service Provider;

8.9.7.2 Does not cancel the Agreement pursuant to any matter referred to in clause 8.9.2, the Service Provider will deliver to SARS, within ten Business Days of SARS's written instruction, a new Performance Bond for the same value as that of the original Performance Bond (and for which purpose clause 8.9 will again apply, *mutatis mutandis*) against delivery of which SARS will pay to the Service Provider the balance, if any, of the amounts remaining from the previous Performance Bond following SARS's recovery of the amounts owing to it in terms of clause 8.9.6.

The Performance Bond will automatically be revoked on expiry of a period of six months after Termination of the Agreement.

8.10 Performance Standards

8.10.1 SARS may prescribe certain performance standards (service levels) with which a successful Bidder must comply in performing the services.

8.10.2 Failure to adhere to the service levels will result in SARS levying a financial penalty for the service-level failure.

8.10.3 Multiple service-level failures in terms of SARS's prescribed service levels will constitute a material breach of the Service Level Agreement.

8.10.4 Notwithstanding the implementation of the service levels and financial penalties, SARS reserves the right, and without derogation to any other remedies it may have in law, to terminate the Service Level Agreement for breach (persistent non-compliance) by the successful Bidder.

9 TRUSTS, JOINT VENTURES, SUB-CONTRACTING, AND OTHER ARRANGEMENTS

9.1 Proof of Existence of a Trust, Joint Venture, Consortium, and Subcontracting Arrangements

9.1.1 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:

9.1.1.1 Details of the trustees of the trust; and

9.1.1.2 Details of the beneficiaries of the trust. If the beneficiary is a trust, the trust deed of that specific trust is required.

9.1.2 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:

9.1.2.1 Identification of each party to the agreement in full;

9.1.2.2 The percentage ownership of the joint venture/consortium of each party to the agreement (if applicable);

9.1.2.3 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/parties;

9.1.2.4 The anticipated percentage of the revenue that the party/parties would receive (anticipated revenue that the party/parties 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

9.1.2.5 Clearly set-out roles and responsibilities of the lead partner and the remainder joint venture/consortium party/parties; the agreement must also clearly identify the lead partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture.

9.1.2.6 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.

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

9.1.3 Where, for the purposes of this RFP, a Bidder has or intends to sub-contract areas of scope of the goods and services, the Bidder must submit the subcontracting agreement, and must note the following:

9.1.3.1 The Bidder must indicate the name of the sub-contractor(s), the percentage of the contract that will be subcontracted, the B-BBEE status level of the sub-contractor(s), and whether the sub-contractor(s) is an Exempted Micro Enterprise (EME) or Qualifying Small Enterprises (QSEs);

9.1.3.2 A Bidder awarded a contract may enter into a sub-contracting arrangement only with the approval of SARS;

9.1.3.3 The agreement will be concluded between the main contractor(s) and SARS; therefore, the main contractor(s) and not its/their sub-contractor(s) will be held liable for performance in terms of the contractual obligations;

9.1.3.4 The successful Bidder must, always, be solely and entirely accountable to SARS for the performance of its contractual obligations in terms of the agreement; and

9.1.3.5 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 sub-contracting agreements; the full details of the functions which the sub-contractor will fulfil in terms of the agreement, including details of the delimitations of scope within the services to be assigned to such a sub-contractor; monitoring and reporting of the sub-contractor's participation and performance to SARS; direct participation of sub-contractor(s) in the account and project-planning activities; and sub-contractors' representation in governance structures and committees. SARS will, always, demand fair dealing in the relationship between a Bidder and its sub-contractor(s).

10 COMPLAINTS AND ALLEGATIONS

10.1.1 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 or are written for a particular Bidder, brand, or product, then SARS urges the Bidder to notify the Procurement department within ten days of publication of the bid and to provide details of its complaint for SARS's consideration.

10.1.2 For any suspicious activity, including requests, approaches, or calls asking for upfront payment to secure an award of a bid, or for claims that the outcome of a tender can be influenced toward a

particular Bidder, Bidders are requested to immediately inform SARS's Fraud/Anti-Corruption Hotline at 0800 002 870 or email anti-corruption@sars.gov.za for further investigation.

- 10.1.3 The SARS Hotline mentioned above is an anonymous reporting channel for any unethical behaviour that a Bidder wants to report.

11 GENERAL CONDITIONS OF BIDDING

- 11.1 **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.**

11.2 Reservation of Rights

- 11.2.1 In addition to any rights that 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:

- 11.2.1.1 Make no award or accept part of a proposal rather than the whole;
- 11.2.1.2 Withdraw or cancel this RFP;
- 11.2.1.3 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;
- 11.2.1.4 Schedule additional briefing sessions/site inspections, and to conduct site visits, site inspections, product evaluations, local content evaluations, or perform audits, including due-diligence exercises, on any Bidder whenever SARS deems it prudent to do so;
- 11.2.1.5 No longer consider a Bidder's proposal where adverse information about the Bidder or its proposal submission has come to the attention of SARS, provided that such Bidder is informed accordingly and afforded an opportunity to object;
- 11.2.1.6 Award a proposal — subject to applicable legislation and conditions of tender — based on which the Bidder is offering the best value for money, even if such proposal has not scored the highest points during the evaluation;
- 11.2.1.7 Conduct a risk assessment of a Bidder's capability to deliver the goods and perform the services in accordance with the specified service levels /or to achieve SARS's objectives;
- 11.2.1.8 Request clarification or verification in respect of any information contained in or omitted from a Bidder's proposal, which SARS may do either in writing or at a meeting convened with the Bidder for that purpose;

- 11.2.1.9 Conduct due diligence on any Bidder or its sub-contractor, which may include interviewing customer references or performing other activities to verify information and capabilities submitted or claimed (including visiting a Bidder, sub-contractors, or customer's reference premises, sites, or facilities to verify certain stated facts or assumptions). The Bidder will be obliged to grant SARS with all such access, assistance, or information as SARS may reasonably request. The Bidder must respond within the timeframes set by SARS. By being non-compliant SARS reserves the right not to consider the Bidder's proposal any further; and/or
- 11.2.1.10 Request presentations from such shortlisted Bidders. All costs relating to the preparation of such presentations will be borne by the Bidders.
- 11.2.2 SARS will disqualify, report to National Treasury, and take the necessary steps to restrict any bidder from doing business with the State if the bidder :
 - 11.2.2.1 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;
 - 11.2.2.2 Seeks any assistance, other than assistance officially provided by a government entity, from any employee, advisor, or other representative of a government entity to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a government entity;
 - 11.2.2.3 Makes or offers any gift, gratuity, anything of value, or other inducement, whether lawful or unlawful, to any of SARS's officers, directors, employees, advisors, or other representatives;
 - 11.2.2.4 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 to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a government entity;
 - 11.2.2.5 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;
 - 11.2.2.6 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;

11.2.2.7 Has been found guilty in a court of law or by an administrative or regulatory authority with appropriate jurisdiction on charges of unethical or improper conduct, regardless of whether or not a prison term or penalty was imposed;

11.2.2.8 Is listed on National Treasury's Register for Tender Defaulters or National Treasury's Database of Restricted Suppliers; or

11.2.2.9 Whose tender contains a misrepresentation which is materially incorrect or misleading.

11.2.3 **Bidders' Own Conditions**

11.2.3.1 Bidders may not formulate 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.

11.3 **Conflict of Interest**

11.3.1 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 can resolve the conflict to SARS's satisfaction. If it comes to SARS's knowledge that there was indeed a conflict of interest or a potential conflict of interest, these will be grounds for the immediate disqualification of the Bidder.

11.4 **Confidentiality**

11.4.1 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's examination and evaluation of a proposal.

11.4.2 Throughout this RFP process and thereafter, the Bidders must secure SARS's 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.

11.5 **Fronting**

11.5.1 SARS supports the spirit of B-BBEE and recognises that real empowerment can be achieved only when individuals and businesses conduct 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.

11.5.2 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, Industry and Corporation — 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.

11.6 Insurance

11.6.1 The successful Bidder will be required, on or before the effective date of the agreement and for the duration of the agreement, to have and maintain in force adequate insurance cover consistent with acceptable and prudent business practices and which is acceptable to SARS, which shall include, without limitation, professional indemnity and public liability insurance cover as appropriate.

11.7 Indemnity

11.7.1 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, 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.

11.7.2 A successful Bidder shall indemnify, hold harmless and agree to defend SARS and its officers, employees, agents, successors-in-title, and assigns, from all losses arising from, or in connection with, any of the following:

11.7.2.1 Third-party claims attributable to any breach of the provisions of the Services Agreement by the successful Bidder;

11.7.2.2 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 or omissions;

11.7.2.3 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

11.7.2.4 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.

11.8 Intellectual Property

11.8.1 SARS retains ownership of all intellectual property rights in the documents that form part of this RFP.

11.8.2 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.

11.8.3 Subject to any specific provisions in any service level agreement, master services agreement, work orders, change orders, or any other agreement concluded between SARS and a Bidder in terms of this RFP, all intellectual property rights created, generated, coded, or designed in terms of this bid to meet SARS's business requirements and needs will be, and remain, the perpetual exclusive property of SARS. Successful Bidders who so create, generate, code, or design any intellectual property for SARS in terms of this RFP, undertake to provide SARS with full access to such intellectual property, including the provision of security keys and access codes both during and after the Bidder's appointment as a service provider or vendor.

11.8.4 In the event that any Bidder utilises any third-party intellectual property, in terms of a licence, to submit a bid, or that such third-party intellectual property will be utilised to fulfil SARS's business requirements for the bid, Bidders firstly warrant that they have the rights to do so, and secondly, agree fully to indemnify SARS against in any claims whatsoever arising from the application of third-party intellectual property in the SARS environment and on the basis of SARS's indemnity rights in the indemnity clause above.

11.9 Limitation of Liability

11.9.1 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 because of the Bidder's participation in this RFP process.

11.10 Preparation Costs

11.10.1 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.

11.11 Precedence

11.11.1 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 only if such information expressly states that it amends this document.

11.12 Responsibility for Bidder's Personnel and Sub-contractors

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

11.12.2 If SARS allows a Bidder use of sub-contractors, such sub-contractors will, always, remain the responsibility of the Bidder and SARS will, not under any circumstances, be liable for any losses or damages incurred by such sub-contractors.

11.12.3 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 or its client and any such sub-contractors.

11.12.4 If a Bidder includes evidence of professional experience of individuals who are not currently employed by the said Bidder, then the Bidder must include in its submission a letter or agreement from the respective individual, whose evidence of experience is included in the proposal, that the individual is aware of and agrees that his/her 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.

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

11.13 Prohibition of Participation in Resultant Tender

11.13.1 Any Bidder, whether participating in a trust, joint venture, consortium, 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.

11.14 RFP not an Offer

11.14.1 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.

11.15 SARS's Oath/Affirmation of Secrecy

11.15.1 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 aforementioned policy.

11.16 Screening and Vetting of a Bidder

11.16.1 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's applicable policies.

11.16.2 Obtaining the necessary clearance is the responsibility of the successful Bidder concerned. If the successful Bidder appoints a sub-contractor, the same provisions and measures will apply to the sub-contractor.

11.16.3 The Bidders shall supply and maintain a list of personnel involved on the project indicating their clearance status.

11.17 Tax Compliance

11.17.1 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 its contracts with

SARS.

11.17.2 No contract/bid may be awarded to a supplier that is not tax compliant. SARS reserves the right to withdraw an award made, or cancel a contract concluded with a supplier/successful Bidder if it is established that such supplier/Bidder was in fact not tax compliant at the time of the award. SARS further reserves the right to cancel a contract with a supplier/successful Bidder if such supplier/Bidder does not remain tax compliant for the full term of its contract.

11.17.3 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 working days to rectify their tax-compliance status with SARS. Thereafter, the supplier/Bidder is responsible for providing SARS with proof of its tax-compliance status, which must be verified through CSD or the Tax Compliance System.

11.17.4 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 to achieve full tax compliance.

11.18 Tender Defaulters and Restricted Suppliers

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

11.19 Local Production and Content

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

11.19.2 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.

11.19.3 The appointed supplier shall provide and use, for the performance of this contract, local sub-contractors 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.

11.20 Validity of Information

11.20.1 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.

- 11.20.2 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.

11.21 Governing Law

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

12 INSTRUCTIONS FOR SUBMITTING A RESPONSE TO THIS RFP

Details of the instructions to Bidders for preparing a proposal in response to RFP 04-2025. These instructions must be followed in detail to enable the information contained in the Bidder's proposal to be read, understood, and evaluated in a common and consistent layout. Should a proposal be received that is not in the correct format, SARS reserves the right to reject the entire proposal or portions of the proposal depending on the extent of the deviation from the format described in this document. Information that has not been requested must not be submitted in the Bidder's proposal.

12.1 Proposal Format

- 12.1.1 The Bidder's proposal contents are detailed in paragraph 12.2.
- 12.1.2 The Bidder must submit a single hardcopy of its proposal contained in several hardcopy files, and a single electronic copy.
- 12.1.3 The Bidder's hardcopy must be printed single-sided.
- 12.1.4 Where reference is made to a "hardcopy file", this means a separate A4 ring-bound file. Where reference is made to a "CD", this means a separate CD or DVD. The proposal submission will consist of several hardcopy files and CDs.
- 12.1.5 A file will consist of a hardcopy file and a CD. The CD must be the electronic copy of the hardcopy file.
- 12.1.6 A file (the hardcopy file and CD) must be wrapped and sealed in brown paper and must be labelled with the same text as the hardcopy file and CD.

12.2 Organisation and Content of a Proposal

12.2.1 Common File

Irrespective of which or how many Towers for which the Bidder is submitting a proposal, the Bidder will be required to submit the common file. This file must contain the sections listed below, each divided by a file divider in the hardcopy file and placed in separate directories on the electronic copy (memory stick (USB stick)).

Common File	
Label (on both file cover and memory stick (USB stick)).	RFP 04/2025 <Bidder Name> Common File

No.	File divider/directory name	Content required
1	Covering Letter	<p>A letter from the Bidder confirming the submission of the proposal, and for which Tower(s) or options within the Tower(s) the Bidder is submitting its proposal. This letter must be signed by an authorised signatory of the Bidder.</p> <p>No template is provided. The Bidder can submit the Covering Letter in any format and must be submitted on the Bidder's letterhead.</p> <p>Electronic copies must be in PDF format.</p>
2	Board Resolution	<p>Signed Board Resolution authorising the Bidder's signatory.</p> <p>For the electronic copy, the original signed document must be scanned and submitted in PDF format.</p>

No.	File divider/directory name	Content required
3	SBDs	<p>Completed SBDs.</p> <p><u>Invitation to Bid (SBD1)</u></p> <p><u>Declaration of Interest (SBD 4)</u></p> <p><u>National Industrial Participation Program (SBD 5)</u></p> <p><u>Supplier Cost and Risk Assessment Questionnaire</u></p> <p>The original signed documents must be included in the hardcopy file.</p> <p>For the electronic copy, the original signed document must be scanned and submitted in PDF format.</p>
4	Bidder CSD Registration Report	<p>CSD registration report, including the Tax Clearance Status.</p> <p>In the hardcopy file, a printout of the report obtained from the CSD system should be included. (www.csd.gov.za)</p> <p>For the electronic copy, the downloaded PDF report should be included.</p>
6	Mandatory Response Template for Each Tower for which the Bidder is Submitting a Proposal	<p>A completed template for each Tower for which the Bidder is submitting a proposal:</p> <p><u>Tower x Mandatory Response Template</u> (where x is the Tower reference for which the Bidder is submitting a response)</p> <p>A printout of the completed and signed template(s) must be included in the hardcopy file.</p> <p>The completed template(s) must be submitted in Microsoft Word format in the electronic copy.</p>
7	Annual Financial Statements	<p>The Bidder's last three (3) years' audited annual financial statements.</p> <p>For the electronic copy, the originals must be scanned and submitted in PDF format.</p>

No.	File divider/directory name	Content required
8	Checklist	<p>Completed template:</p> <p><u><i>Proposal Checklist</i></u></p> <p>A signed printout of the completed template must be included in the hardcopy file.</p> <p>A scanned copy of the signed checklist must be submitted in PDF format.</p>

12.2.2 File NP-x (Non-pricing Section for Tower x)

Depending on which and for how many Towers the Bidder is submitting a proposal, the Bidder will be required to submit a File NP-x for each Tower bid upon (where x is the Tower reference). This file must contain the following sections, each divided by a file divider in the hardcopy file and placed in separate directories on the electronic copy memory stick (USB stick) and labelled as set out hereunder. Note that the x is the Tower reference appearing in the title, divider name, directory names, and filenames.

Note that if a Bidder is submitting a proposal for more than one Tower, the same documents may have to be submitted in more than one File. (For example, if a sub-contractor is proposed in more than one Tower, then the sub-contractor's CSD Registration Report should be submitted in each Tower file for which the sub-contractor is being proposed). Note that an original certificate need not be supplied in every file, provided that where a copy is provided, the copy must contain a note referencing the file in which the original is contained. This principle applies to all documents, so that all documents for a Tower are contained within the file for a Tower and can be evaluated as a self-contained pack.

File NP-x (Non-Pricing Section for Tower x)

Label (on both file cover and memory stick (USB stick)).	<p style="text-align: center;">RFP 04/2025</p> <p style="text-align: center;"><Bidder Name></p> <p style="text-align: center;">File-NP-x</p> <p style="text-align: center;">Non-pricing</p>
---	---

No.	File divider/directory name	Content required
1	Technical Response Template	<p>Completed template:</p> <p style="text-align: center;"><u><i>Tower x Technical Response Template</i></u></p> <p>A printout of the completed, signed, and initialled template must be included in the hardcopy file.</p> <p>The completed template must be submitted in Microsoft Word format in the electronic copy.</p>
2	Contract Agreement	<p>The Bidder must submit a signed agreement with the contract mark-up.</p>
3	Sub-contractor CSD Registration Report.	<p>In the hardcopy file a printout of the report obtained from the CSD system should be included. (www.csd.gov.za).</p> <p>In the electronic copy, the downloaded PDF report should be included.</p>

12.2.3 File P-x (Pricing and B-BBEE/Specific Goals Section for Tower x)

Depending on which and how many Towers the Bidder is submitting a proposal for, the Bidder will be required to submit a File P-x for each Tower for which it is submitting a proposal (where x is the Tower reference). This file contains one section to be placed in a file divider in the hardcopy file and in a directory on the electronic-copy memory stick (USB stick) with the label set out hereunder. Note that the “x” (appearing in the title, directories, and filenames) is the Tower reference. The actual Tower reference must be substituted for “x” in the Bidder’s response.

Note that if a Bidder is submitting a proposal for more than one Tower, the same documents may have to be submitted in more than one file. (For example, if a sub-contractor is proposed in more

than one Tower, then the sub-contractor's B-BBEE certificate must be submitted in each Tower file for which the sub-contractor is being proposed.) Note that an original certificate need not be supplied in every file, provided that where a copy is provided, the copy must contain a note referencing the file in which the original is contained. This principle applies to all documents, so that all documents for a Tower are contained within the file for a Tower and can be evaluated as a self-contained pack.

File P-x (Pricing Section for Tower x)	
Label (on both file cover and CD)	RFP 04/2025
	<Bidder Name>
	File-P-x
	Pricing

No.	File divider/directory name	Content required
1	Pricing Response Template	<p>Completed template:</p> <p><u><i>Tower x Pricing Response Template</i></u></p> <p>A printout of the completed template must be included in the hardcopy file.</p> <p>The completed template must be submitted in Microsoft Excel format in the electronic copy.</p>
2	Preference Points Claim Form	A completed Preference Points Claim Form (SBD 6.1) for Tower x.
3	Bidder's BEE Certificate	<p>The Bidder's B-BBEE certificate, valid at the closing date.</p> <p>For the electronic copy, the original hardcopy must be scanned and submitted in PDF format.</p>
4	Sub-contractor B-BBEE Certificates	<p>For every sub-contractor named by the Bidder in Template 1 in 0 above, the Bidder must attach a B-BBEE certificate or auditor's report in the hardcopy file.</p> <p>The B-BBEE certificates must be scanned and submitted as PDF documents on the memory stick (USB stick).</p>

12.3 Example

12.3.1 If a Bidder is submitting a proposal for Tower D and Tower V, it must consist of the following:

Files	Documents in the file
<p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 04/2025</p> <p style="text-align: center;"><Bidder Name></p> <p style="text-align: center;">Common File</p> <p>Electronic response to be submitted in a memory stick (USB stick) labelled:</p> <p>RFP 04-2025-<Bidder Name>-Common</p>	<ul style="list-style-type: none"> • Covering Letter • Board Resolution • SBDs • Bidder's CSD Registration Report • Mandatory template for Tower D and the mandatory template for Tower V • Annual Financial Statements • Proposal Checklist (indicating that all documents have been submitted)
<p>Non-pricing Section — Tower D</p> <p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 04/2025</p> <p style="text-align: center;"><Bidder Name></p> <p style="text-align: center;">File NP-D</p> <p style="text-align: center;">Non-pricing</p> <p>Electronic response to be submitted in a memory stick (USB stick) labelled:</p> <p>RFP02-2024-<Bidder Name>-NP-D</p>	<ul style="list-style-type: none"> • Technical response template for Tower D • Contract mark-up template for Tower D • Sub-contractor list • Sub-contractor's CSD Registration Report
<p>Pricing Section — Tower D</p> <p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 04/2025</p> <p style="text-align: center;"><Bidder Name></p> <p style="text-align: center;">File P-D</p> <p style="text-align: center;">Pricing</p> <p>Electronic response to be submitted in a memory</p>	<ul style="list-style-type: none"> • Pricing Response Template for Tower D • Preference Points Claim Form SBD 6.1 for Tower D • Bidder's B-BBEE certificate • Sub-contractors' B-BBEE certificates

Files	Documents in the file
<p>stick (USB stick) labelled:</p> <p>RFP02-2024-<Bidder Name>-P-D</p>	
<p>Non-pricing Section — Tower V</p> <p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 04/2025</p> <p style="text-align: center;"><Bidder Name></p> <p style="text-align: center;">File NP-V</p> <p style="text-align: center;">Non-pricing</p> <p>Electronic response to be submitted in a memory stick (USB stick) labelled:</p> <p>RFP02-2024-<Bidder Name>-NP-V</p>	<ul style="list-style-type: none"> • Technical Response Template for Tower V • Contract Response Template for Tower V • Sub-contractor list • Sub-contractor's CSD Registration Report • Sub-contractors' B-BBEE certificates
<p>Pricing Section — Tower V</p> <p>Hardcopy response to be submitted in file labelled:</p> <p style="text-align: center;">RFP 04/2025</p> <p style="text-align: center;"><Bidder Name></p> <p style="text-align: center;">File P-V</p> <p style="text-align: center;">Pricing</p> <p>Electronic response to be submitted in a memory stick (USB stick) labelled:</p> <p>RFP02-2024-<Bidder Name>-P-V</p>	<ul style="list-style-type: none"> • Pricing Response Template for Tower V. • Preference Points Claim Form SBD 6.1 for Tower V • Bidder's B-BBEE certificate • Sub-contractors' B-BBEE certificates

The Bidder, in this example, will submit five (5) sealed packages wrapped in brown paper:

- (i) A package containing the hardcopy file of the Common File and the memory stick (USB stick) of the Common File labelled:

RFP 04/2025

<Bidder Name>

Common File

- (ii) A package containing the hardcopy file of File NP-D and the memory stick (USB stick) of File NP-D labelled:

RFP 04/2025

<Bidder Name>

File NP-D

Non-pricing

- (iii) A package containing the hardcopy file of File P-D and the memory stick (USB stick) of File P-D labelled:

RFP 04/2025

<Bidder Name>

File P-D

Pricing

- (iv) A package containing the hardcopy file of File NP-V and the memory stick (USB stick) of File NP-V labelled:

RFP 04/2025

<Bidder Name>

File NP-V

Non-pricing

- (v) A package containing the hardcopy file of File P-V and the memory stick (USB stick) of File P-V labelled:

RFP 04/2025

<Bidder Name>

File P-V

Pricing

12.4 Template-specific Instructions

12.4.1 Mandatory Template

The Bidder must complete and submit the Tower x Mandatory Response Template (where x is the Tower reference) for each Tower for which the Bidder is submitting a proposal.

The completed template(s) must be included in File 1 (Common File).

12.4.2 Pricing Response Template

For each Tower which the Bidder is submitting a proposal for, the Bidder must provide a response to the Tower x Pricing Response Template (where x is the Tower reference).

The detailed instructions for preparing a response to the Tower x Pricing Response Template (where x is the Tower reference) are embedded in the template.

Bidders must submit an electronic copy, as well as a signed and initialled hardcopy of the Pricing Response Template. A submission that is not accompanied by an electronic copy will not be considered. The completed pricing template must contain values in all cells that must be populated. If the price is 0 (zero) for an item, the Bidder must ensure a zero is entered.

The completed template must be included in the pricing section for the Tower.

12.4.3 Technical Response Template

The Bidder must complete and submit Tower x Technical Response Template for each Tower which it is submitting a proposal for (where x is the Tower reference).

The Bidder must provide responses to all questions, requests for information or detail, or other requests posed to the Bidder in the technical response template document(s). Where a response is requested in the template and no response is supplied by the Bidder, the Bidder will score zero for that section.

The completed template must be included in the non-pricing section for the Tower.

12.4.4 Proposal Checklist

The Bidder must complete, and a duly authorised representative must sign, the Proposal Checklist. Only one checklist must be submitted, regardless of the number of Towers for which the Bidder is submitting a proposal.

The completed template must be included in the Common File.