

BUSINESS REQUIREMENTS SPECIFICATION

RFP19/2025 Appointment of a Service Provider for the Maintenance and Support of the South African Revenue Service (SARS) & Office of the Tax Ombud (OTO) Corporate Websites

This document forms part of the Request for Procurement (RFP) pack. The document sets out the business requirements that SARS and the OTO have for the Maintenance and Support of the SARS & OTO Corporate Websites and the model under which the services are to be provided.

USAGE OF TERMS IN THIS DOCUMENT

The capitalised terms in this document appearing in the glossary table below will have the meanings given to them in this glossary table.

Term	Meaning
SARS	South African Revenue Service
OTO	Office of the Tax Ombudsman
SP	Service Provider
Microsoft Azure - WordPress Website Partner	A Microsoft partner accredited for the maintenance and support of Migrate Enterprise Applications to Microsoft Azure specialization in South Africa.
Enterprise Agreement (EA)	The Microsoft EA allows organizations with more than 250 PCs, devices and/or users to license Microsoft software and cloud services over a three-year period at the best available pricing.
SaaS	Software as a Service
WordPress	Opensource Platform on which the SARS and OTO website is built.
Azure	Cloud computing platform which offers a host of services including storage, networking, security and analytics.

Important note to Bidder: The specifications set out in this document contain mandatory requirements. Where a mandatory requirement is set out in this document (indicated by 'must' in the stated requirement) the Bidder's Proposal must address such requirement. If a Proposal fails to meet or does not address a mandatory

requirement, the Proposal may, at SARS's discretion, be disqualified at any stage of the evaluation process as being a non-responsive Proposal.

1. BACKGROUND

- a. In recent years SARS and the OTO's corporate Websites were migrated to WordPress hosted on Azure (Microsoft cloud). Currently SARS and the OTO do not have the requisite skills and competencies to provide end-to-end in-house support for WordPress hosted on Azure. Therefore, a Microsoft partner must be appointed to provide architectural and technical support for the SARS and OTO corporate websites and should be accredited in South Africa in **Migrate Enterprise Applications to Microsoft Azure specialization**.
- b. The accredited Microsoft Partner in **Migrate Enterprise Applications to Microsoft Azure specialization** will ensure the maintenance and support of the SARS corporate website as well the OTO website hosted on Microsoft Azure and that it adheres to Microsoft Enterprise Agreement contract guidelines. **SARS and OTO will henceforth be referred to as "the client"**.
- c. The primary objective of this RFP is thus to select and appoint an accredited Microsoft partner with the knowledge and skills in **Migrate Enterprise Applications to Microsoft Azure specialization** with the additional duties as set out in this Business Requirements Specification. The term of the WordPress Partner appointment will be for a period of three (3) years.

2. WORDPRESS SUPPORT AND MAINTENANCE REQUIREMENTS

a. Required Standards of Expertise

- i. The WordPress Website Solution Partner must, at all times during the term, be able to provide the client with knowledgeable, competent advance Web Application Modernization experts to support and maintain the client's WordPress Website as well as their Azure environment.
- ii. The Bidder must demonstrate that it has a sufficient number of Microsoft Certified Professionals for support of the WordPress Website in Azure in order to render effective service to the client. The Bidder must provide evidence of number of staff it has in its employment with such certifications.

b. Required Standards of Service and Information

- i. The WordPress Website Solution Partner must provide the client with accurate, complete and timeous information. The standard of service, the type of information and the specific turnaround times required by SARS and OTO are stated in the applicable paragraphs of this document.

c. Accreditation

- i. The WordPress Website Solution Partner must maintain its accreditation as a Microsoft Accredited Partner for the maintenance and support of **Migrate Enterprise Applications to Microsoft Azure specialization** for the duration of the agreement. The client may terminate the WordPress Website Solution Partner appointment should they lose their accredited status.

d. Cloud Services

- i. As the corporate website is an Azure Cloud application (SaaS) the accredited Microsoft Partner in **Migrate Enterprise Applications to Microsoft Azure specialization** is expected to have Cloud certified professional(s) to provide support on cloud cost, subscription, consumption, make recommendations based on best practise and optimising business continuity. The support should include maintenance of any development environments associated with the lifecycle of the production environment. This includes maintenance of Azure resources e.g. MySQL databases, storage accounts, WAF, Application gateways and App services.

e. Account Management: Account Manager

- i. The WordPress Website Solution Partner must appoint an account manager to manage the client accounts. The WordPress Website Solution Partner must propose suitable candidates to the client and the client will have the right to reject the proposal on reasonable grounds. The client may interview the candidates proposed by the WordPress Website Solution Partner to establish the suitability of the incumbent Service Provider.
- ii. The effective management of the client's account will include ensuring maintenance and support are executed timeously, information requested by the client is accurate, complete and timeously returned, and that the client's interests are competently represented by the Account Manager.
- iii. The account manager must facilitate timeous placing of orders and obtaining invoices.
- iv. The account manager must, on an on-going basis, maintain relationships with all the client's internal stakeholders throughout the lifecycle of the EA.

- v. The client may request the WordPress Website Solution Partner to remove an account manager if in the client's opinion the account manager is not managing the client's account effectively.
- vi. The account manager must hand the account over to a replacement account manager should circumstances warrant it, without disruption of service to the client.
- vii. In the event that the account manager can no longer perform the duties of account manager, (the events may include but are not limited to illness, incapacity, resignation, transfer) the WordPress Website Solution Partner must inform the client as soon as the WordPress Website Solution Partner becomes aware of it. The WordPress Website Solution Partner must replace the account manager in accordance with aforementioned guidance.
- viii. During the Transitioning in Phase, the Account Manager must complete the Contract Obligation Tracker (COT) guided by Supplier Management and report on it on a monthly basis.

f. Enterprise Agreement Support

- i. The WordPress Website Solution Partner will work with the client in identifying cost reductions, effective use of Azure resources and reservations. The partner will not create or deploy resources without the express knowledge and approval of the client.

g. Software Advice

- i. The WordPress Website Solution Partner must provide, at no cost to the client, WordPress plugin related advice. This advice includes, but is not limited to:
 - Regular review of plugin choices and make recommendations on improvements.
 - Keep up to date with WordPress security bulletins to mitigate risks of security breaches.
 - The WordPress Website Solution Provider may also be required to work with the SARS security team to resolve any access or permission issues relating to the cloud environment.
 - It is the responsibility of the service provider to inform the client of any changes in staff (those allocated to the contract), so that the permissions can be revoked.
 - In the event of a software or infrastructure update that requires a release/change process, the SP will ensure that a project plan is supplied, and requisite time is allocated for the change process.
 - The SP will ensure that the Cloud backup process is working correctly and monitored to ensure that restoration in a disaster recovery process is handled quickly and effectively.
 - The SP will setup additional monitoring to aid in troubleshooting server errors and general website availability problems.

- The SP will track/monitor any updates on the environment (Azure upgrades/maintenance as well as client specific updates eg certificate renewals) and inform the client timeously of these updates and work together with internal teams to act on these updates (where necessary).

3. MEETINGS

a. General

- i. The WordPress Website Solution Partner must ensure the participation by Microsoft resources in meetings to expedite decision making when requested by the client.
- ii. Repeated failure to attend, hold meetings, document minutes will result in a warning from the client and may be considered by the client as a service level violation and result in the WordPress Website Solution Partner's replacement if the WordPress Website Solution Partner fails to rectify.

b. Ad Hoc Meetings

- i. The WordPress Website Solution Partner must readily respond to all ad hoc meeting requests from SARS and make available any such resources to ensure resolution of issues on the agenda. The WordPress Website Solution Partner may be requested to schedule, conduct and minute the meeting on the client's request. The WordPress Website Solution Partner shall request participation by Microsoft resources to expedite decision making.

c. Quarterly Review Meetings

- i. The WordPress Website Solution Partner must schedule, conduct and minute quarterly review meetings with SARS and OTO Executives. The following items must be tabled in the meeting for discussion:
 - Demonstration of WordPress Website Solution Partner value-add; and
 - Items escalated from Monthly Operational Meeting.
- ii. The meeting should also address a summary of all items discussed in the Monthly Operational Meeting as specified below as well as any items carried forward from previous quarterly meetings.

d. Monthly Operational Meetings

- i. The WordPress Website Solution Partner must schedule, conduct and minute monthly operational meetings with the client. The following items must be tabled in the meeting for discussion:
 - List of operational issues logged/escalated to the WordPress Website Solution Partner and the related resolutions/actions taken by the WordPress Website Solution Partner.

- Any related matters which require the client's attention.

4. SERVICE LEVEL SPECIFICATIONS

Service Level Requirements			
Service Description	MTTResponse	MTTResolve	Target
Service Request	1 Hour	8 hours	95%
Service coverage is from 08h00 until 17h00, Monday to Friday excluding public holidays.			

5. SERVICE LEVEL DEFAULT

- a. This is to be reviewed on a monthly basis. If service levels do not meet targets set, then the matter will be escalated. This is not conclusive cumulative Service Levels provisions that are applicable, the parties may at any time during contract negotiation stage prior to the finalisation or conclusion of the Agreement agree on the actual applicable Service Levels and Escalation processes.
- b. Should the service offered by the WordPress Website Solution Partner fall below the service expectations described in the foregoing paragraphs then the client may choose to change its WordPress Website Solution Partner at any time by giving written notice at least thirty (30) days prior to the date of the change.

6. GENERAL

a. Reports

- i. In addition to all the reports already specified in the previous paragraphs, the client may request the WordPress Website Solution Partner to provide other reports on an ad hoc basis.

b. Meetings scheduling and minute taking

- i. The WordPress Website Solution Partner must schedule and provide secretariat duties to the following meetings:
- ii. Monthly Operational Meeting.
- iii. Quarterly Review Meeting.
- iv. Ad Hoc Meetings; and

7. AGREEMENT TERMINATION

- a. Except for reason of service default, the WordPress Website Solution Partner appointment will expire at the end of the three (3) year term.

8. HANDOVER ARRANGEMENTS

- a. Upon the appointment of another WordPress Website Solution Partner the incumbent WordPress Website Solution Partner will ensure the smooth handover of all information and services to avoid any disruption of service to the client.

9. TRAINING AND DEVELOPMENT

- a. The selected service provider to deliver training and skills transfer for the maintenance and support of the OTO WordPress website hosted on Microsoft Azure. The selected provider must equip internal IT personnel with the necessary skills to manage, troubleshoot, and optimize the website effectively. This would include the general editing and management of content as well as the use of custom plugins that the OTO webmaster has installed. It is expected that the SP would formulate training documentation that covers the specific editing requirements for the OTO website, as well as the management of the installed plugins (and keep this updated in the case of changes). Please allow for 48 hours of maintenance, editing, support training spread out over the 3 years and to be scheduled by the client on a need's basis. Training will be recorded so that trainees can refer back to the material covered.