

# **SOUTH AFRICAN REVENUE SERVICE**

## **REQUEST FOR PROPOSAL**

**RFP 25/2025**

**APPOINTMENT OF A SERVICE PROVIDER FOR MARKETING  
AND ADVERTISING SERVICES FOR SARS AND OTO**

**MAIN RFP DOCUMENT**

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

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## REQUEST FOR PROPOSAL

### Summary, Guidelines, Conditions and Instructions

#### 1. PURPOSE OF THIS REQUEST FOR PROPOSAL

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

#### 2. OVERVIEW OF SARS' REQUIREMENTS

##### 2.1 SUMMARY OF THE SCOPE

The scope of work and the required services are detailed in the Business Requirements Specification (BRS) document that form an integral part of RFP 25/2025. Refer to Annexure A.

##### 2.2 BACKGROUND

SARS and the Office of the Tax Ombudsman (OTO) requires a full-service marketing and advertising agency which offers a wide range of services that cover the traditional, digital and creative marketing aspects of their businesses. The appointed marketing and advertising agency is further required to assist SARS with Marketing and Communication, Taxpayer and Trader Education and the OTO with the enhancement of their overarching strategies. In addition, the conceptualisation, development and implementation of comprehensive through-the-line marketing and tactical communication plans and products in support of the overall strategic objectives of SARS and the OTO. This encompasses all products, programmes and campaigns including brand building, positioning and advertising thereof.

Advertising, Taxpayer and Trader Education (*hereinafter Education*) and Marketing is an important aspect of SARS and OTO's marketing, education and communication strategy, and it is a platform which the organisation uses to reach out to taxpayers and traders about important tax matters.

#### 3. STRUCTURE OF THE RFP PACK

##### 3.1 STRUCTURE

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

**Table 3A: RFP pack outline and contents**

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

#### 4. KEY ACTIVITIES AND DATES

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

**Table 4A: Key activities and dates**

| No. | Activity                             | Date / Time / Details  |
|-----|--------------------------------------|--|
| 1.  | <b>Bid Number:</b>                   | RFP 25/2025  |
| 2.  | <b>Description:</b>                  | Appointment of a service provider for marketing and advertising services for SARS and the OTO  |
| 3.  | <b>Duration of contract:</b>         | The successful bidder will be appointed for a <b>period of sixty (60) months</b> , subject to SARS's terms and conditions  |
| 4.  | <b>Validity period of proposals:</b> | Bids submitted will be valid for a period of 180 calendar days from closing date. SARS may however, subject to the bidders' consent, extend the validity period prior to expiry thereof. |

| No. | Activity   | Date / Time / Details  |
|-----|--|--|
| 5.  | Advertisement of the RFP:  | a) National Treasury e-Tender Portal: 29 September 2025<br>b) SARS website: 29 September 2025  |
| 6.  | RFP pack (complete set of bid documents) available for download from National Treasury e-Tender Portal and SARS website: | 29 September 2025  |
| 7.  | Virtual briefing session date and registration:  | A non- compulsory briefing session will be held on 6 October 2025 at 11H00 virtually via Microsoft Teams meeting and can be accessed at the following link:<br><a href="#">Join the meeting now</a><br>Meeting ID: 394 979 755 995 6<br>Passcode: RF3cF6jM |
| 8.  | Bidders to submit written questions only during this period:   | 29 September 2025 to 10 October 2025   |
| 9.  | SARS to respond to bidders' written questions on or before:  | 16 October 2025  |
| 10. | CLOSING DATE AND TIME (proposals due):   | 29 October 2025 at 11:00 South African time  |

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

## 5. COMMUNICATION

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

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

## 6. TENDER PREPARATION AND SUBMISSION

### 6.1 INTRODUCTION

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

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

### 6.2 QUESTION AND ANSWER PROCESS

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

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

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

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

### **6.3 CENTRAL SUPPLIER DATABASE**

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

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

### **6.4 PROPOSAL SUBMISSION**

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

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

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

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

## 6.5 INSTRUCTION FOR SUBMITTING A PROPOSAL

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

All proposals and supporting documentation must be submitted in English.

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

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



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

**Table 6A: Format and organisation of proposal**

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

## 7. EVALUATION OF PROPOSALS

### 7.1 PROCESS AFTER THE CLOSING DATE

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

### 7.2 PREQUALIFICATION EVALUATION PROCESS (GATE 0)

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

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

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

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

**Table 7A: Prequalification criteria**

| #  | Prequalification documents to be submitted   | Instructions  | Non-submission will result in disqualification?  |
|----|--|---|--|
| 1. | SBD 1: Invitation to bid form  | Bidder to complete and sign the supplied pro forma document.  | YES  |
| 2. | SBD 4: Bidder's Disclosure   | Bidder to complete and sign the supplied pro forma document.  | YES  |
| 3. | SBD 6.1: Preference points claim form  | Bidder to complete and sign the supplied pro forma document, to claim the points for B-BBEE / specific goals.   | NO<br>Non-submission will lead to a zero score on B-BBEE / specific goals.                                 |
| 4. | Supplier Risk Questionnaire  | Bidder to complete and sign the supplied pro forma document.  | NO   |
| 5. | Proof of registration on the Central Supplier Database (CSD)                               | Bidder to submit the proof of registration on CSD.  | NO<br>However, a bidder must be registered on CSD in order to be considered for award.                     |
| 6. | Draft Agreement with comments on track changes and/or General Conditions of Contract (GCC) | Bidder to sign the supplied pro forma document. Bidder to indicate their acceptance of the terms and conditions set out in the draft Agreement in their bid proposal covering letter. | NO<br>The recommended bidder(s) will be required to sign the applicable Services Level Agreement on award. |
| 7. | A complete set of three (3) most recent years annual financial statements                  | Submit complete sets of three (3) most recent years annual financial statements in accordance with the requirements of the Financial Risk Analysis paragraph as detailed in this RFP. | NO   |

### 7.3 TECHNICAL EVALUATION PROCESS (GATE 1)

Only bidder(s) that have met the Pre-Qualification Criteria in Gate 0 will be evaluated in Gate 1 for functionality/ technical criteria. Note that this document aids as a guideline on the points to be scored for these elements, and this document is ONLY to be scored by the SARS Technical Evaluators based on the extensive information provided in the proposal submission.

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

All functional criteria will be scored, and a threshold will be set for stage 2. If the stage 2 threshold is met, then the qualifying bids will be processed further for selection.

| #   | Criteria   | Weight | Model Answer   |
|-----|--|--------|--|
| 1   | Company Profile  | 22     |  |
| 1.1 | <p>Bidder must provide a comprehensive company profile detailing:</p> <ul style="list-style-type: none"> <li>• Company's years of experience in providing marketing and advertising services; and</li> <li>• Infrastructure to be able to produce work of the same quality standard as an on-going business even during a crisis (e.g. Business interruption (system and non-system related) and loadshedding), SARS and OTO work must be securely stored and readily accessible via backup solutions, such as cloud storage and to be able to communicate with SARS and OTO (by having e.g. laptops, tablets, cell phones and systems in place to connect virtually e.g. zoom, Ms Teams)</li> </ul> |        | The Bidder has provided  |
|     |  | 1      | <ul style="list-style-type: none"> <li>• Company has minimum 5 years of experience in providing marketing and advertising services = 1</li> <li>• No information provided / Less than 5 years= 0</li> </ul>  |
|     |  | 3      | <ul style="list-style-type: none"> <li>• Infrastructure to be able to produce work of the same quality standard as an on-going business even during a crisis (e.g. Business interruption (system and non-system related) and loadshedding)(1), SARS and OTO work must be securely stored and readily accessible via backup solutions (1), such as cloud storage and to be able to communicate with SARS and OTO (by having e.g. laptops, tablets, cell phones and systems in place to connect virtually e.g. zoom, Ms team) (1)= 3</li> <li>• No information provided = 0</li> </ul> |

| #   | Criteria   | Weight | Model Answer   |
|-----|--|--------|--|
| 1.2 | <p>The bidder must demonstrate the ability to provide a full spectrum of in-house services tailored to marketing and advertising, including both traditional and technology-enhanced capabilities. These services should reflect a strategic, creative, and technically proficient approach to content creation and campaign execution. In addition, the bidder must demonstrate forward-thinking with the use of AI technologies to deliver innovative, scalable, and impactful content across multiple platforms.</p> <ul style="list-style-type: none"> <li>• Strategy development</li> <li>• Production management</li> <li>• TV production</li> <li>• Radio production</li> <li>• Digital advertising</li> <li>• Photography</li> <li>• Videography</li> <li>• Animation</li> <li>• Evidence of use of AI technology</li> </ul> | 18     | <p>The bidder has provided the following in-house service:</p> <ul style="list-style-type: none"> <li>• Strategy development</li> <li>• Production management</li> <li>• TV production</li> <li>• Radio production</li> <li>• Digital advertising</li> <li>• Photography</li> <li>• Videography</li> <li>• Animation</li> <li>• Evidence of use of AI technology</li> </ul> <p>• 18 = Bidder will score 18 points for meeting all the requirements above</p> <p>• 0 = No information provided, bidder will score 0 if one or more of the requirements is not met</p> |

| #     | Criteria   | Weight | Model Answer                       |
|-------|--|--------|------------------------------------|
| 2     | Resources  | 45     |                                    |
| 2.1   | Retainer Resources   | 27     |                                    |
| 2.1.1 | <p>Bidder must provide the following retainer resources which will be assigned to SARS:</p> <p>The bidder must provide a one (1) page Curriculum Vitae (CV) for each resource listed which must be signed by both the individuals concerned and the authorised official of the bidder illustrating the following:</p> <ul style="list-style-type: none"> <li>• Level of expertise (Designation/Title) of each resource recommended to SARS</li> <li>• Years of experience in the required industry sectors and</li> <li>• Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning to the level of a Diploma verified by SAQA) and provide certified copy. Date of certified copies should not be older than 6 months.</li> </ul> |        | Bidder has provided the following: |

|  |  |   |   |
|--|--|---|---|
|  | <ul style="list-style-type: none"> <li>• Strategist Director with a minimum of 10 years of proven experience in one of the following industries: marketing, communication, public relations and advertising with 5 years of experience being in the financial sector.</li> </ul> | 3 | <p><b>Strategist Director on the SARS account</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>• Bidder has provided a Strategy Director = 1</li> <li>• No information provided = 0</li> </ul> <p>(NB: If role is not provided, bidder will not be scored for experience and qualification)</p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 10 years of proven experience as a Strategist Director in one of the following industries marketing, communication, public relations and advertising with 5 years of experience being in the financial sector = 1</li> <li>• No information provided / less than 10 years of proven experience in any of the following industries: marketing, communication, public relations and advertising / less than 5 years of experience being in the financial sector = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |
|--|--|---|---|

|  |   |   |  |
|--|---|---|--|
|  | <ul style="list-style-type: none"> <li>• Senior Client Service Person with a minimum of 10 years of proven experience in one of the following industries: marketing, communication, public relations and advertising with 5 years of experience being in the financial sector.</li> </ul> | 3 | <p><b>Senior Client Service Person</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>•Bidder has provided a Senior Client Services Person = 1</li> <li>•No information provided = 0</li> </ul> <p><b>(NB: If role is not provided, bidder will not be scored for experience and qualification)</b></p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 10 years' of proven experience as a Senior Client Service Person in one of the following industries: marketing, communication, public relations and advertising with 5 years of experience being in the financial sector = 1</li> <li>• No information provided / less than 10 years of proven experience in any of the following industries: marketing, communication, public relations and advertising / less than 5 years of experience being in the financial sector = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |
|--|---|---|--|



| # | Criteria  | Weight | Model Answer  |
|---|---|--------|---|
|   | <ul style="list-style-type: none"> <li>Client Service Support Person with a minimum of 5 years of proven experience in one of the following industries: marketing, communication, public relations and advertising with 5 years of experience being in the financial sector.</li> </ul> | 3      | <p><b>Client Service Support Person</b></p> <p><b>Level of expertise (Designation/Title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>Bidder has provided a Client Service Support Person= 1</li> <li>No information provided = 0</li> </ul> <p><b>(NB: If role is not provided, bidder will not be scored for experience and qualification)</b></p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>The resource has minimum of 5 years of proven experience in one of the following industries: marketing, communication, public relations and advertising with 5 years of experience being in the financial sector =1</li> <li>No information provided / less than 5 years of proven experience in any of the following industries: marketing, communication, public relations and advertising / less than 5 years of experience being in the financial sector = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

|  |   |   |   |
|--|---|---|---|
|  | <ul style="list-style-type: none"> <li>• Traffic Manager with a minimum of 5 years of proven experience in one of the following industries: marketing, communication, public relations and advertising with 2 years of experience being in the financial sector.</li> </ul> | 3 | <p><b>Traffic Manager</b></p> <p><b>Level of expertise (Designation/Title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>•Bidder has provided a Traffic Manager = 1</li> <li>•No information provided = 0</li> </ul> <p><b>(NB: If role is not provided, bidder will not be scored for experience and qualification)</b></p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 5 years of proven experience in one of the following industries: marketing, communication, public relations and advertising with 2 years of experience being in the financial sector = 1</li> <li>• No information provided / less than 5 years of proven experience in any of the following industries: marketing, communication, public relations and advertising / less than 2 years of experience being in the financial sector = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |
|--|---|---|---|

| # | Criteria  | Weight | Model Answer  |
|---|---|--------|---|
|   | <ul style="list-style-type: none"> <li>• Senior Creative Person with a minimum of 8 years of proven experience in creativity with 4 years of experience being in the financial sector.</li> </ul> | 3      | <p><b>Senior Creative Person</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>• Bidder has provided an Art Person = 1</li> <li>• No information provided = 0</li> </ul> <p><b>(NB: If role is not provided, bidder will not be scored for experience and qualification)</b></p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 8 years' experience as a Senior Creative Person in creativity with 4 years of experience being in the financial sector = 1</li> <li>• No information provided / less than 8 years' experience as a Senior Creative Person in creativity / has less than 4 years of experience in the financial sector = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

| # | Criteria   | Weight | Model Answer  |
|---|--|--------|---|
|   | <ul style="list-style-type: none"> <li>• Art Person with a minimum of 5 years of proven experience in design;</li> </ul> | 3      | <p><b>Art Person</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>• Bidder has provided an Art person = 1</li> <li>• No information provided = 0</li> </ul> <p><b>(NB: if role is not provided, bidder will not be scored for experience and qualification)</b></p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 5 years' experience as an Art Person in the marketing and advertising industry = 1</li> <li>• No information provided / less than 5 years of experience = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

| # | Criteria   | Weight | Model Answer  |
|---|--|--------|---|
|   | <ul style="list-style-type: none"> <li>• Copywriter with a minimum of 5 years of proven experience in copy writing;</li> </ul> | 3      | <p><b>Copywriter</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>• Bidder has provided a Copywriter = 1</li> <li>• No information provided = 0</li> </ul> <p><b>(NB: if role is not provided, bidder will not be scored for experience and qualification)</b></p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 5 years' experience as a Copywriter in the marketing and advertising industry = 1</li> <li>• No information provided / less than 5 years of experience = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

| # | Criteria   | Weight | Model Answer  |
|---|--|--------|---|
|   | <ul style="list-style-type: none"> <li>• Researcher with a minimum of 10 years of proven experience in market research; and</li> </ul> | 3      | <p><b>Researcher</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>• Bidder has provided a Researcher = 1</li> <li>• No information provided = 0</li> </ul> <p><b>(NB: if role is not provided, bidder will not be scored for experience and qualification)</b></p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 10 years' experience as researcher in the marketing and advertising industry = 1</li> <li>• No information provided / less than 10 years of experience = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

| # | Criteria  | Weight | Model Answer  |
|---|---|--------|---|
|   | <ul style="list-style-type: none"> <li>Graphic designer with a minimum of 5 years of proven experience in graphic design</li> </ul> | 3      | <p><b>Graphic Designer</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>Bidder has provided a Graphic Designer = 1</li> <li>No information provided = 0</li> </ul> <p><b>(NB: if role is not provided, bidder will not be scored for experience and qualification)</b></p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>The resource has minimum of 5 years' experience as a Graphic designer in the marketing and advertising industry = 1</li> <li>No information provided / less than 5 years of experience = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

| #     | Criteria   | Weight | Model Answer                              |
|-------|--|--------|---|
| 2.1.2 | <b>Ad hoc resources for production services</b>  | 10     |   |
|       | <p>Bidder must provide the following retainer resources which will be assigned to SARS:</p> <p>The bidder must provide a one (1) page Curriculum Vitae (CV) for each resource listed which must be signed by both the individuals concerned and the authorised official of the bidder illustrating the following:</p> <ul style="list-style-type: none"> <li>• Level of expertise (Designation/Title) of each resource recommended to SARS</li> <li>• Years of experience in the required industry sectors and</li> <li>• Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy. Date of certified copies should not be older than 6 months.</li> </ul> |        | <p>Bidder has provided the following:</p> |



|  |  |   |  |
|--|--|---|--|
|  | <p>Strategy Planner with a minimum of 10 years of proven experience in one of the following industries: marketing, communication, public relations and advertising with 3 years of experience being in the financial sector.</p> | 2 | <p><b>Strategy Planner</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>•Bidder has provided a Strategy Planner</li> </ul> <p>There are no points for the title, however, experience and qualifications will be given points as follows:</p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 10 years of proven in one of the following industries marketing, communication, public relations and advertising with 3 years of experience being in the financial sector = 1</li> <li>• No information provided / less than 10 years of proven experience in any of the following industries: marketing, communication, public relations and advertising / less than 3 years of experience being in the financial sector = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |
|--|--|---|--|

| # | Criteria  | Weight | Model Answer  |
|---|---|--------|---|
|   | Production Manager with a minimum of 5 years of proven experience in production management. | 2      | <p><b>Production Manager</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>• Bidder has provided a Production Manager</li> </ul> <p>No points will be awarded for the title; however, points will be allocated based on relevant experience and qualifications as outlined below:</p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 5 years of proven experience in production management = 1</li> <li>• No information provided / less than 5 years of proven experience in production management = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

| # | Criteria  | Weight | Model Answer  |
|---|---|--------|---|
|   | Animator with a minimum of 5 years of proven experience in the field (TV, Film, gaming, advertising, education and more.) | 2      | <p><b>Animator</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>•Bidder has provided a Animator</li> </ul> <p>No points will be awarded for the title; however, points will be allocated based on relevant experience and qualifications as outlined below:</p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 5 years of proven experience in the field (TV, Film, gaming, advertising, education and more.)= 1</li> <li>• No information provided / less than 5 years of proven experience in the field (TV, Film, gaming, advertising, education and more.) = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

| # | Criteria   | Weight | Model Answer   |
|---|--|--------|--|
|   | Videographer with a minimum of 5 years of proven experience as a videographer. | 2      | <p><b>Videographer</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>•Bidder has provided a Videographer</li> </ul> <p>No points will be awarded for the title; however, points will be allocated based on relevant experience and qualifications as outlined below:</p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 5 years of proven experience as a videographer = 1</li> <li>• No information provided / less than 5 years of proven experience as a videographer = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |

|   |          |   |
|---|----------|---|
| <p>Branding Activation Specialist with a minimum of 5 years of proven experience in brand management and marketing.</p> | <p>2</p> | <p><b>Branding Activation Specialist</b></p> <p><b>Level of expertise (Designation/Title - link resource title to SARS resource title) of each resource recommended to SARS</b></p> <ul style="list-style-type: none"> <li>• Bidder has provided a Branding Activation Specialist</li> </ul> <p>No points will be awarded for the title; however, points will be allocated based on relevant experience and qualifications as outlined below:</p> <p><b>Years of experience in the industry</b></p> <ul style="list-style-type: none"> <li>• The resource has minimum of 5 years of proven experience in brand management and marketing = 1</li> <li>• No information provided / less than 5 years of proven experience in brand management and marketing = 0</li> </ul> <p><b>Qualifications (Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA) and provide certified copy</b></p> <ul style="list-style-type: none"> <li>• Certified copy of Relevant Degree, Diploma or equivalent, Recognition of Prior Learning verification or confirmation from SAQA and Date of certified copies is not older than 6 months. = 1</li> <li>• No information provided/certified copies not provided/Date of certified copies is older than 6 months. = 0</li> </ul> |
|---|----------|---|

| #     | Criteria   | Weight | Model Answer  |
|-------|--|--------|---|
| 2.1.3 | <b>Dedicated Training Requirements</b>   | 8      |   |
|       | <p>Qualified and Experienced Producer:</p> <p>The bidder must submit a portfolio of previous work demonstrating their ability to train staff with emphasis on the following:</p> <ul style="list-style-type: none"> <li>a. A structured skills transfer plan and outcomes.</li> <li>b. Use of AI-driven tools and omnichannel content production.</li> <li>c. Demonstrate access to studio and equipment.</li> </ul> | 4      | <p>Bidder has submitted a portfolio of previous work done demonstrating measurable impact in each of the following:</p> <ul style="list-style-type: none"> <li>a. ability to train staff with a structured plan with clear objectives, timelines, curriculum, delivery methods, engagement plan and outcome (measurable improvements in staff knowledge or skills)</li> <li>b. Use of AI-driven tools and omnichannel content production</li> <li>c. Access to studio and equipment</li> </ul> <p>Bidder must meet all three (3) requirements = 4</p> <p>No information provided/partial information provided = 0</p> |

| # | Criteria   | Weight | Model Answer   |
|---|--|--------|--|
|   | <p>Qualified and Experienced Scriptwriter:</p> <p>The bidder must submit a portfolio of previous work demonstrating their ability to train staff with emphasis on the following:</p> <ul style="list-style-type: none"> <li>a. Engaging and strategic scripts tailored to different audiences.</li> <li>b. Using a structured skills transfer plan and outcomes.</li> <li>c. Use of AI-driven tools and omnichannel content production.</li> </ul> | 4      | <p>Portfolio of previous work done demonstrating measurable impact in each of the following:</p> <ul style="list-style-type: none"> <li>a. Scripts of previous work tailored for three (3) audiences.</li> <li>b. ability to train staff with a structured plan with clear objectives, timelines, curriculum, delivery methods, engagement plan and outcome (measurable improvements in staff knowledge or skills)</li> <li>c. Use of AI-driven tools and omnichannel content production.</li> </ul> <p>Bidder must meet all three (3) requirements<br/>= 4<br/>No information provided/partial information provided = 0</p> |
| 3 | Capability   | 18     |  |

| #   | Criteria  | Weight | Model Answer  |
|-----|---|--------|---|
| 3.1 | <p>Bidder must provide a schedule of its experience and proven track record over the past four (4) years with 3 clients and not more where they implemented these three (3) types of campaigns: digital, multimedia education and outreach. The information provided for each client must include:</p> <ul style="list-style-type: none"> <li>• Client name;</li> <li>• Description of a project / campaign;</li> <li>• Contract period;</li> <li>• Value of the project;</li> <li>• Challenges and how they were resolved; and</li> <li>• Value-added services.</li> <li>• Showreel (Mp3 /PowerPoint video format) demonstration of creative execution through-the-line per campaign.</li> </ul> | 18     | <p>Bidder has provided a schedule of its experience and proven track record over the past four (4) years for three (3) clients where they've implemented three (3) types of campaigns: digital, multimedia education and outreach by including the following:</p> <ul style="list-style-type: none"> <li>• Client name;</li> <li>• Description of a project / campaign;</li> <li>• Contract period;</li> <li>• Value of the project;</li> </ul> <p><b>NB: The above is not evaluated but needed. Each bidder must submit only one campaign type per client and may not replicate that same campaign type for any other client.</b></p> <ul style="list-style-type: none"> <li>• Challenges and if they were resolved = 2 per client; and</li> <li>• Value-added services = 2 per client</li> <li>• Showreel (Mp3 /PowerPoint video format) demonstration of creative execution through-the-line per campaign =2</li> <li>• No information provided = 0</li> </ul> |



| #   | Criteria   | Weight                   | Model Answer  |
|-----|--|--------------------------|---|
| 4   | Testimonials   | 8                        |   |
| 4.1 | <p>Bidders are required to submit testimonials (not older than 5 years) from <b>only</b> two (2) clients listed on 3 clients above where similar services were provided. Refer to Annexure B which must be completed by the Bidder's Clients. Each testimonial must include but not be limited to:</p> <ul style="list-style-type: none"> <li>• Client name;</li> <li>• Contact person, phone number, email address, company business address;</li> <li>• A brief description of the full services rendered</li> <li>• Value of the project;</li> <li>• Quality of service;</li> <li>• Quality of reports;</li> <li>• Whether work was completed within budget or not</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• Annexure B may be copied to the client's company letterhead or</li> </ul> | <div></div> <div>2</div> | <p>Bidder has submitted signed testimonials (not older than 5 years) from only two (2) clients used in capability category, where similar services were provided. Each testimonial must be on a client (i.e. company) letterhead and include but not be limited to:</p> <ul style="list-style-type: none"> <li>• Client name;</li> <li>• Contact person, phone number, company business address;</li> <li>• A brief description of full services rendered;</li> </ul> <p><b>NB:</b></p> <ul style="list-style-type: none"> <li>• The above are not evaluated but must be provided. If they are not provided bidder will score 0 for the specific testimonial</li> <li>• If description of the service rendered is not aligned to the SARS required services, bidder will get 0 points for the specific testimonial.</li> <li>• Bidder will get maximum of 4 points per relevant testimonial</li> </ul> <p><b>Value of the project;</b></p> <ul style="list-style-type: none"> <li>• above R1 000 000 = 1 points per testimonial</li> <li>• R1 000 000 – R500 000 = 0.5 point per testimonial</li> <li>• No information provided / below R500 000 = 0</li> </ul> |

| #          | Criteria  | Weight   | Model Answer   |
|------------|---|----------|--|
|            | <p>authenticated with a company stamp. <b>It is important to keep SARS format of questionnaire.</b></p> <ul style="list-style-type: none"> <li>SARS reserves the right to contact the clients for a reference check. It is important to ensure that the clients are contactable.</li> </ul> | 2        | <p><b>Quality of service provided is</b></p> <ul style="list-style-type: none"> <li>Good = 1 points per testimonial</li> <li>Average = 0.5 points per testimonial</li> <li>No information provided / Poor = 0</li> </ul> |
|            |   | 2        | <p><b>Quality of reports provided</b></p> <ul style="list-style-type: none"> <li>Good = 1 points per testimonial</li> <li>Average = 0.5 points per testimonial</li> <li>No information provided / Poor = 0</li> </ul>    |
|            |   | 2        | <p><b>Completed within budget / cost.</b></p> <ul style="list-style-type: none"> <li>Yes = 1 point per testimonial</li> <li>No information provided / No = 0</li> </ul>  |
| <b>5</b>   | <b>SARS and OTO Brand</b>   | <b>4</b> |  |
| <b>5.1</b> | Bidders are required to compile a one-page document demonstrating an understanding of SARS and Office of the Tax Ombud (in not more than 500 words on MS Word):   |          |  |

| #     | Criteria   | Weight | Model Answer   |
|-------|--|--------|--|
| 5.1.1 | • An understanding of the SARS and OTO brands and their mandate, SARS higher purpose, tax types, target audiences, communication channels and corporate identity | 1      | <ul style="list-style-type: none"> <li>• Clear evidence of detailed research including SARS &amp; OTO mandate, SARS higher purpose, tax types, target audiences, communication channels , corporate identity = 1</li> <li>• No information provided/partial information provided = 0</li> </ul>  |
| 5.1.2 | An understanding of challenges facing the SARS and OTO brands and how these could be addressed.  | 3      | <p>Bidder demonstrates an understanding of external factors and forces that are not controlled by SARS and OTO that have an influence in respect of organisations deliverables. These factors include:</p> <ul style="list-style-type: none"> <li>• Demographic and Cultural = (0.5)</li> <li>• Economic = (0.5)</li> <li>• Technological = (0.5)</li> <li>• Legal and political = (0.5)</li> </ul> <p>No information provided = 0</p> |

| #            | Criteria  | Weight     | Model Answer  |
|--------------|---|------------|---|
|              |   |            | <p>Bidder demonstrates an understanding of internal factors that can directly affect SARS and OTO market decisions. These factors include:</p> <ul style="list-style-type: none"> <li>• Service providers /suppliers = (0.5)</li> <li>• All Taxpayers = (0.5)</li> </ul> <p>No information provided = 0</p>   |
| <b>6</b>     | <b>Contractual Skills Transfer</b>  | <b>3</b>   |   |
| 6.1          | <p>Bidders must submit a skills transfer plan that demonstrate their approach to ensure skills and knowledge transfer to nominated SARS and OTO staff during post-campaign implementation reviews of each campaign. The skills transfer plan must contain the following minimum details:</p> <ul style="list-style-type: none"> <li>• Skills transfer plan with outcomes or deliverables.</li> <li>• Details of how the Successful Bidder will report to SARS and OTO on progress made; and</li> <li>• Details of how the SARS and OTO Communication and Education teams, who participate in the skills transfer program, will be assessed to determine their comprehension of skills transferred.</li> </ul> | 3          | <p>Bidder has provided:</p> <ul style="list-style-type: none"> <li>• A practical skills transfer plan with outcomes or deliverables in line with the scope of services required = 1</li> <li>• Details of how the Successful Bidder will report to SARS and OTO on progress made on the skills transfer per campaign assigned = 1 and</li> <li>• Details of how the SARS and OTO Communication and Education teams, who participate in the skills transfer program, will be assessed to determine their comprehension of skills transferred = 1</li> </ul> <p>No information provided = 0</p> |
| <b>TOTAL</b> |   | <b>100</b> |   |

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

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

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

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

| #            | Criteria       | Points     |
|--------------|----------------|------------|
| 1.           | Price          | 80         |
| 2.           | Specific goals | 20         |
| <b>TOTAL</b> |                | <b>100</b> |

### 7.4.1 Price evaluation (Gate 2, Stage 1)

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

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

**Table 8: Pricing evaluation formula**

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

Where

$P_s$  = Points scored for price of proposal under consideration

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

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

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

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

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

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

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

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

#### Requirements for Specific Goals

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

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

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

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

#### Points to be claimed

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

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

| No | The specific goals allocated points in terms of this tender | Number of points allocated (80/20 system)<br><br>(To be completed by the organ of state) | Evidence required  |
|----|---|--|--|
| 5. | An entity owned by Persons with Disabilities.               | 4  | B-BBEE Certificate / Sworn-Affidavit B-BBEE Certificate.<br><br>SARS reserves the right to request for Certified copy of ID Documents of the Owners and Doctor's note confirming the disability and/or Employment Equity Act 1(EEA1) form. |

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

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

### 7.5 Financial risk analysis

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

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



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

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

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

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

## 7.7 PROPOSED LEGAL AGREEMENT

- 7.7.1 Should an award be made to a bidder under this RFP, SARS and such bidder must conclude a written Services Agreement within the number of days stipulated in the letter of award.
- 7.7.2 If the recommended bidder(s) fails to sign the proposed Services Agreement within the time frame stipulated, SARS reserves the right to:
- cancel the award to the recommended bidder; or
  - take any other action SARS deems reasonable and appropriate.
- 7.7.3 Upon award, SARS and the successful bidders will conclude the Supplementary Agreement. In this regard:
- The draft Services Agreement constitutes the specialised terms and conditions upon which SARS is prepared to contractually engage the prospective Bidder(s) to render the services under this bid.
  - The bidder is requested to indicate acceptance of the terms and conditions set out in the draft supplementary in their bid proposal covering letter.
  - SARS will be entitled to cease contracting with a bidder if SARS, in its sole discretion, is of the opinion that: (i) the bidder has made misrepresentations in its proposal; (ii) the bidder is attempting to withdraw from positions or commitments made in its proposal; or (iii) an agreement may not be expeditiously concluded with the bidder for any other reason.
  - SARS reserves the right to vary the terms and conditions of the proposed Services Agreement prior to presenting the final draft of the Services Agreement for signature to the bidder at SARS' sole discretion.
  - A bidder should note that the terms of its proposal to the extent that it aligns with the RFP, will be incorporated in the proposed Services Agreement by reference and that SARS relies upon the bidder's proposal as a material representation in making an award to a successful bidder and in concluding a Services Agreement with the bidder. It follows therefore that any misrepresentations in a proposal may result in legal action or other processes by SARS against the bidder, notwithstanding the conclusion of a Services Agreement between SARS and the bidder for the provision of the goods and services in question. Services Agreement

## **7.8 INSURANCE AND RELATED RISK MONITORING**

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

## **7.9 INDEMNITY**

### **7.9.1 Indemnity in respect of the RFP**

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

### **7.9.2 Indemnity in respect of the Services Agreement**

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

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

## 7.10 LIABILITY

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

## 8. TRUSTS, JOINT VENTURES, SUBCONTRACTING AND OTHER ARRANGEMENTS

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

- 8.1.1 Where, for the purposes of this RFP, a bidder submits its proposal as a trust, such bidder must submit concrete proof of the existence of a trust. SARS will accept a registered trust deed as acceptable proof of the existence of a trust. The trust deed must include amongst others:
  - Details of the trustees of the trust; and
  - Details of the beneficiaries of the trust. In instances where the beneficiary is a trust, the trust deed of that specific trust is required.
- 8.1.2 Where, for the purposes of this RFP, a bidder submits its proposal as a joint venture or consortium (incorporated or unincorporated), the bidder must submit the joint venture / consortium agreement, which sets forth the following details:
  - identification of each party to the agreement in full;
  - the percentage ownership of the joint venture / consortium of each party to the agreement (if applicable);

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

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

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

activities; and subcontractors' representation in governance structures and committees. SARS will, at all times, demand fair dealing in the relationship between a bidder and its subcontractor(s).

## **9. COMPLAINTS AND ALLEGATIONS**

- 9.1** Should a Bidder have rational reasons to believe that the tender process is unfair or irregular, including the fact that the technical specifications are not open and/or are written for a particular bidder, brand or product; the bidder is urged to notify the Procurement Department within ten (10) days after publication of the bid and provide details of its complaint for SARS' consideration.
- 9.2** Any suspicious activity, including requests, approaches or calls asking for upfront payment to secure an award of a bid or in lieu of claims that the outcome of a tender can be influenced towards a particular bidder, bidders are requested to immediately inform the *SARS Fraud / Anti-Corruption* Hotline at 0800-002870 or email at [anti-corruption@sars.gov.za](mailto:anti-corruption@sars.gov.za) for further investigation.
- 9.3** The "SARS hotline" further provides an anonymous reporting channel for any unethical behaviour that a bidder wants to report.

## **10. GENERAL CONDITIONS OF BIDDING**

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

### **10.2 Reservation of rights**

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

- a) make no award, or to accept part of a proposal rather than the whole;
- b) withdraw, or cancel this RFP;
- c) amend, vary, or supplement any of the information, terms or requirements contained in this RFP, any information or requirements delivered pursuant to this RFP, or the structure of the RFP process;
- d) schedule additional briefing sessions / site inspections, and to conduct site visits, site inspections, product evaluations, local content evaluations, and/or perform audits including due diligence exercises on any bidder whenever SARS deems it prudent to do so;
- e) no longer consider a bidder's proposal where adverse information about the bidder or
- f) its proposal submission has come to the attention of SARS, provided that such bidder is informed accordingly and afforded an opportunity to object;

- g) subject to applicable legislation and conditions of tender, award a proposal based on which bidder is offering the best value for money, even if such proposal has not scored the highest points during the evaluation;
- h) conduct a risk assessment of a bidder's capability to deliver the goods and perform the services in accordance with the specified service levels and/or achieve SARS' objectives;
- i) request clarification or verification in respect of any information contained in or omitted
- j) from a bidder's proposal, which SARS may do either in writing or at a meeting convened with the bidder for that purpose;
- k) conduct a due diligence on any bidder or its subcontractor, which may include interviewing customer references or performing other activities to verify information and capabilities submitted, claimed, or otherwise, (including visiting a bidder's, subcontractors, or customer reference premises, sites and/or facilities to verify certain stated facts or assumptions). The bidder will be obliged to grant SARS with all such access, assistance and/or information as SARS may reasonably request. The bidder must respond within the timeframes set by SARS, failing which SARS reserves the right not to consider the bidder's proposal any further; and/or
- l) request presentations from such short-listed bidders. All costs relating to the preparation of such presentations will be borne by the bidders.

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

- a) engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other bidder in respect of the subject matter of this RFP;
- b) seeks any assistance, other than assistance officially provided by a government entity, from any employee, advisor or other representative of a government entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a government entity;
- c) makes or offers any gift, gratuity, anything of value or other inducement, whether lawful
- d) or unlawful, to any of SARS' officers, directors, employees, advisors or other representatives;
- e) makes or offers any gift, gratuity, anything of any value or other inducement, to any government entity's officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a government entity;

- f) accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a government entity;
- g) pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, which is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a government entity;
- h) has been found guilty in a court of law or administrative or regulatory authority having appropriate jurisdiction on charges of unethical or improper conduct, regardless of whether or not a prison term or penalty was imposed;
- i) is listed on the National Treasury's Register for Tender Defaulters or the National Treasury's Database of Restricted Suppliers; or
- j) whose tender contains a misrepresentation which is materially incorrect or misleading.

#### 10.2.3 Bidders' own conditions

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

### 10.3 Conflict of interest

- 10.3.1 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 is able to resolve the conflict to SARS' satisfaction. If it comes to SARS' knowledge that there was indeed a conflict of interest or a potential conflict of interest, same will be grounds for the immediate disqualification of the bidder.

### 10.4 Confidentiality

- 10.4.1 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' examination and evaluation of a proposal.
- 10.4.2 Throughout this RFP process and thereafter, the bidders must secure SARS' written approval prior to the release of any information that pertains to (i) the potential work or activities to which this RFP relates; or (ii) the process which follows this RFP. Failure to adhere to this requirement may result in disqualification from the RFP process and such legal action as SARS may deem suitable.



## 10.5 Fronting

- 10.5.1 SARS supports the spirit of broad-based black economic empowerment and recognises that real empowerment can only be achieved through individuals and businesses conducting themselves in accordance with the Constitution and in an honest, fair, equitable, transparent and legally compliant manner. Against this background SARS condemns any form of fronting.
- 10.5.2 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 and Industry be established during such enquiry / investigation, the onus will be on the bidder / contractor to prove that fronting does not exist. Failure to do so within a period of 14 days from date of notification may invalidate the bid / contract and may also result in the restriction of the bidder / contractor to conduct business with the public sector for a period not exceeding ten years, in addition to any other remedies SARS may have against the bidder / contractor concerned.

## 10.6 Indemnity

### 10.6.1 Indemnity in respect of the RFP

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

### 10.6.2 Indemnity in respect of the Services Agreement

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

premises caused by the negligent acts or omissions of the successful bidder or its employees; and

- e) Third party claims arising from damage to property owned or leased by SARS or a third party caused by the successful bidder's or its employees' negligence or misconduct.

## **10.7 Intellectual property**

### **10.7.1 Intellectual property in respect of the RFP**

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

### **10.7.2 Intellectual property in respect of the Services Agreement**

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

## **10.8 Limitation of liability**

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

## **10.9 Preparation costs**

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

#### **10.10 Precedence**

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

#### **10.11 Responsibility for bidder's personnel and subcontractors**

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

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

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

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

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

#### **10.12 Prohibition of participation in resultant tender**

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

#### **10.13 RFP not an offer**

This RFP does not constitute an offer to do business with SARS, but merely serves as an invitation to bidders to facilitate a requirements-based decision process. Nothing in this RFP or

any other communication made between SARS (including its officers, directors, employees, advisers and representatives) is a representation that SARS will offer, award or enter into an agreement with the bidder.

#### **10.14 SARS' oath / affirmation of secrecy**

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

#### **10.15 Screening and vetting of a bidder**

10.15.1 Acceptance of a bidder's proposal is subject to the condition that both the successful bidder and its personnel providing the goods and services, must be screened and cleared by the appropriate authorities to the grade of clearance in line with SARS' applicable policies.

10.15.2 Obtaining the necessary clearance is the responsibility of the successful bidder concerned. If the successful bidder appoints a subcontractor, the same provisions and measures will apply to the subcontractor.

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

#### **10.16 Tax compliance**

10.16.1 It is a requirement that any supplier conducting business with SARS is tax compliant at the date of award of a contract / bid and remains tax compliant throughout the duration of their contracts with SARS.

- a) Verification of tax compliance status prior to award
- b) SARS must verify supplier/ bidder's tax compliance status prior to the awarding of a contract.
- c) No contract / bid may be awarded to a supplier who is not tax compliant.
- d) Where the recommended supplier / bidder is not tax compliant, it must be notified in writing of their non-compliant status and be granted a minimum of seven (7) working days to submit written proof regarding their tax compliance status with SARS or proof that arrangement has been made with SARS to meet their outstanding tax obligations.
- e) Should the recommended bidder/ supplier fail to provide written proof of their tax compliance status as contemplated in paragraph 10.19 above, SARS as the procuring entity must reject the bid submitted.

- f) Accordingly, the supplier / bidder is responsible to provide SARS with proof of its tax compliance status which must be verified through the Central Supplier Database or e-Filing.

**10.16.2 Verification and/or confirmation of tax compliance status during the course and scope of executing awarded contract**

- a) SARS reserves the right to request the supplier or successful bidder to provide written proof of tax compliance status at any time during the execution of the awarded contract.
- b) Further, SARS reserves the right to withdraw an award made, or cancel a contract concluded with a supplier / successful bidder in the event that it is established that such supplier / bidder was in fact not tax compliant at the time of the award.
- c) Furthermore, SARS reserves the right to cancel a contract with a supplier / successful bidder in the event that such supplier/bidder does not remain tax compliant for the full term of its contract.
- d) In line with SARS's strategic objectives, the directors / owners of the bidding entity who are not tax compliant may be referred to the SARS tax compliance unit for further investigation in order to achieve full tax compliance.

**10.17 Tender defaulters and restricted suppliers**

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

**10.18 Local production and content**

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

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

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

**10.19 Validity of information**

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

10.19.2 10.19.2 A bidder is deemed to have examined this RFP and any other information supplied by SARS to the bidder and to have satisfied itself as to the correctness and sufficiency of such information before submitting any of its responses.

## **10.20 10.20 Governing law**

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

## 11. CHECKLIST OF RETURNABLES

**Table 11: Checklist of returnable documents**

|     | Checklist of returnable documents   | Comply | Do not comply | Section |
|-----|---|--------|---------------|---------|
| 1.  | A hardcopy and an electronic copy RFP proposal submission has been submitted for this RFP.  |        |               |         |
| 2.  | The pricing information is included as a separate file (File 2) and is not included in the Mandatory file (File 1).   |        |               |         |
| 3.  | SBD 1: Invitation to bid form has been completed and signed.  |        |               |         |
| 4.  | SBD 4: Bidder's Disclosure has been completed and signed.   |        |               |         |
| 5.  | SBD 6.1: Preference points claim form has been completed, points for B-BBEE / specific goals claimed, and signed.   |        |               |         |
| 6.  | Proof of registration on the Central Supplier Database (CSD) has been submitted.  |        |               |         |
| 7.  | <ul style="list-style-type: none"> <li>Response to Technical Requirements – this response is <b>to be substantiated in the proposal submission and</b></li> <li>Bidder to indicate where in the proposal submission this offering is substantiated (page and paragraph) and</li> <li>bidder should not score themselves on this technical evaluation sheet (this is a guidance document)</li> </ul> |        |               |         |
| 8.  | Annexure B: Testimonial Template  |        |               |         |
| 9.  | Draft Services Agreement/ General Conditions of Contract (GCC) has been completed and signed.   |        |               |         |
| 10. | All the pricing evaluation requirements have been submitted with this bid <b>and</b> the pricing template, Annexure C, has been completed in full and signed.   |        |               |         |
| 11. | All the B-BBEE/specific goals evaluation and specific goal requirements have been submitted with this bid.  |        |               |         |
| 12. | A complete set of three (3) most recent years annual financial statements.  |        |               |         |