

APPOINTMENT OF A GROUP LIFE INSURER FOR A PERIOD OF SIXTY (60) MONTHS

COMPULSORY VIRTUAL BRIEFING SESSION: 27 AUGUST 2025 AT 11:00AM

RFP NO.: RFP 22/2025

CLOSING DATE: 23 SEPTEMBER 2025 11:00 AM



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Purpose: Compulsory Briefing Session

- Purpose
 - explain selected concepts, procedures and other aspects of the RFP
 - confirm formal registration of Bidders for notices and other communications
- It may contain
 - additional information
 - additional rules that must be adhered to
- It does not
 - cover every item in the RFP
 - replace any of the issued RFP material
 - change any of the RFP rules unless explicitly communicated in writing
- The briefing session slides will be posted on the SARS website
- The RFP pack remains the primary source of information for the Bidder to respond.



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Procedures during Briefing Session

- **The session is being recorded**
- **Questions during the session.**
 - SARS will take questions during the session, and respond to that in writing
 - ✓ All questions and answers will be published as part of the wider Q & A process
 - ✓ The published answers will take precedence over any verbal response given in the briefing session
 - SARS will review and focus on most pertinent themes arising from the questions and provide answers where possible



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Communication Requirements

- **Strict communication channels to be adhered to (refer to RFP document)**
 - Bidders will be disqualified for non-compliance
 - No solicitation of information will be allowed other than by prescribed channels
- Deadlines to be strictly met
- Adhere to prescribed submission format to ensure queries are properly dealt with



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RFP TIMELINES

ACTIVITY	DATE DUE
Advertisement of Bid in the: <ul style="list-style-type: none">• Issuing of the RFP documents SARS	20 August 2025
Compulsory virtual briefing session	27 August 2025 AT 11:00
Last date for questions relating to RFP	3 September 2025
Bid Closing Date	23 September 2025 AT 11:00
Notice to bidders	November 2025



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BACKGROUND & SCOPE OF WORK

Refer to Annexure A for the Background and overview of SARS' requirements (scope of work and requirements) for the appointment of a Group Life Insurer.



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BID EVALUATION PROCESS Refer to section 7 of the RFP doc

Gate 0

Pre-Qualification

- Invitation to Bid (SBD 1)
- Standard Bidding Document (SBD 4)
- Preference Point Claim Form (SBD 6.1)
- Central Registration Report (Central Database System) from NT
- General Conditions of Contract (GCC)
- Supplier Risk Questionnaire



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BID EVALUATION PROCESS

Refer to section 7 of the RFP doc

Gate 1

Mandatory Evaluation

Mandatory Evaluations is structured in two parts:

Part A: FSCA Certificate

Part B: Annexure A1: Mandatory Benefits requirements

Mandatory Evaluation Criteria

- A valid Certificate/License of an Authorised Financial Service Provider with the Financial Sector Conduct Authority (FSCA)
- Non-submission of the required documentation will result in the disqualification of the bidder



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BID EVALUATION PROCESS

Refer to section 7 of the RFP doc

Gate 1

Technical
Evaluation

100
points

Achieve overall score of 70 out
of 100 points to proceed to the
next gate

Gate 2

Price = 90

BBBEE = 10

100
points

• 7.3 Technical Requirements

The bidder to provide comprehensive proposal as supporting documents in line with the technical evaluation criteria addressing the ten (10) listed requirements. Refer to Annexure A2

- B-BBEE Certificate/ Sworn Affidavit
- Preference Point Claim Form (SBD 6.1)
- Annexure B – Pricing Template



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Bid Evaluation Process Gate 3 – Price

The Price and B-BBEE points will be added together to determine each bidder's overall score out of 100 points.

Stage 1: Price Evaluation (90 points)

Bidders must refer to Annexure B – Pricing Schedule

Adjudication Criteria	Points
Price	90

P_s = Points scored for price of Bid under consideration
 P_t = Rand value of Bid under consideration
 P_{min} = Rand value of lowest acceptable Bid



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B-BBEE evaluation (Gate 3, Stage 2) Refer to section 7.5.4 of the RFP doc

Points for the B-BBEE/specific goals evaluation will be allocated in accordance with a bidder's B-BBEE compliance as per SBD 6.1 Preference points claim form claimed. Points for specific goals can only be awarded to a bidder who submits a valid B-BBEE certificate for the verification of points claimed together with the SBD 6.1 Preference points claim form.

Adjudication Criteria	Points
Specific Goals	10



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SPECIFIC GOALS

Points for the specific goals evaluation will be allocated in accordance with a bidder's B-BBEE compliance as per SBD 6.1.

The specific goals allocated points in terms of this tender as per SBD6.1	Number of points allocated (10)
The abovementioned points are broken down as per below	
An Entity that has at least 51% Black ownership	3
An entity that has at least 30% Black women ownership	3
An entity that has at least 51% Black youth ownership.	2
An entity that is least 51% owned by persons with disability.	2



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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
- 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



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FINANCIAL ANALYSIS EVALUATION

- Bidders are required to submit the public interest score and complete sets of audited / independently reviewed annual financial statements in compliance with the Companies Act for the three (3) most recent financial periods in the name of the bidding entity. The financial statement analysis will be conducted on the shortlisted bidder.
- The annual financial statements must contain:
 - Statement of Profit and Loss and Other Comprehensive Income;
 - Statement of Financial Position;
 - Statement of Cash Flows;
 - Statement of changes in equity/ net assets ; and
 - Accompanying Notes.
- Entities which are trading for less than three (3) financial periods must provide:
 - A letter detailing that fact, signed by a duly authorised representative of the entity;
 - The annual financial statements that the entity is able to provide, taking into account the period that it has been trading; and
 - Any other information or documentation which would provide more clarity on the financial history of the bidder.



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FINANCIAL ANALYSIS EVALUATION

In the event of the bid being in the form of a Joint Venture (JV), the following is required:

- Annual financial statements of the JV for a registered JV and for unincorporated JV annual financial statements of each company;
- A JV legal agreement detailing the percentage ownership of each entity; and
- A consolidated B-BBEE Certificate.

SARS reserves the right to request further information with regards to the annual financial statements of a bidder at a later stage.



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SUPPLEMENTARY AGREEMENT

Bidders are requested to:

- ☐ Comment on the terms and conditions set out in the supplementary agreement and where necessary, propose required changes to such terms and conditions;
- ☐ Each comment and/or amendment must be explained; and
- ☐ All changes and/or amendments to the Supplementary Agreement must be in an easily identifiable colour font and tracked for ease of reference.
- ☐ SARS reserves the right to accept or reject any or all amendments or additions proposed by the successful bidder if such amendments or additions are unacceptable to SARS or pose a risk to the organisation.



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BID SUBMISSION

- Bidders must submit one (1) hardcopy submission (A4 ring bound lever arch file) and one (1) electronic submission(USB) **23 September 2025 at 11:00**
- Bid documents will only be considered if received by SARS by the **23 September 2025 at 11:00**, regardless of the method used to send or deliver such documents to SARS.

File



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Content of File 1

TENDER BOX

Email submission

Any enquiries must be referred, in writing via email: tenderoffice@sars.gov.za



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FILE 1: ORIGINAL

Folder 1 Technical
Response

Section 1

Pre-qualification documents

- SBD documents and other documents

Section 2

Mandatory Response

- Bidders must submit supporting documents for mandatory requirements.
- Response to mandatory and revised requirements (proposal submission detailing requirements as per Annexure A1)

Section 3

Technical Response

- Response to technical requirements
- Supporting documents for technical requirements Supporting documents to be provided for all requirements as well as completed Annexure A2.



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FILE 1: ORIGINAL

Section 4

Company Profile
Supplementary information

Folder 1 Technical
Response

Section 5

Draft supplementary agreement



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FILE 2: ORIGINAL

Section 1

B-BBEE

- B-BBEE Certificate/ Sworn Affidavit
- SBD 6.1

Section 2

Pricing

- Annexure B : Pricing Schedule

Section 3

Financial Analysis

- A complete set of three (3) most recent years annual financial statements as detailed in this RFP

NB ! Each file must be marked correctly and sealed separately for easy reference during the evaluation process. USB must be marked with Bidder Name



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Thank you
Siyabulela
Siyabonga
Siyathokoza
Dankie
Re a leboga
Re a leboha
Ro livhuwa
Ha khensa



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