

ANNEXURE A: BUSINESS REQUIREMENTS SPECIFICATION DOCUMENT

1. BACKGROUND

One of the strategic functions of the SARS Media Unit is to conduct a media environmental scan through media monitoring and analysis to inform SARS leadership and management of developments that have a bearing on SARS' organisational reputation and messaging. In addition, media monitoring and analysis contributes to SARS' mandate of revenue collection and to promote tax and Customs & Excise compliance.

A service provider is required to provide SARS with detailed and comprehensive media monitoring and analysis reports. This includes qualitative daily and weekly reports of coverage in all print, broadcast, online and social media (online-news, TikTok, Instagram, X (Twitter), and Facebook,) with provision of PDF versions of print reports or links to print reports if they are available, audio clips and videos emanating from the broadcast or online media.

In addition to the daily and weekly comprehensive media reports at specified times, listing all SARS-specific and related coverage in accordance with agreed key words to be provided, the service provider is required to provide an early morning summarised version of relevant content, prioritised in terms of strategic, operational, and reputational value to the organisation, with easy access to original content.

Qualitative analysis reports are required monthly, quarterly and annually. These reports are a detailed analytical assessment of perceptions of SARS and sentiment as expressed by media commentators, stakeholders and taxpayers in the media. Analysis should identify and highlight the burning issues, reporting trends, angles and potential reputational risks, providing strategic insight to protect, promote and preserve the integrity of SARS.

2. TECHNICAL LEGISLATION AND/OR STANDARDS

The bidder(s) must comply with all legislation and/or standards applicable to the services required in terms of this RFP, namely, but not limited thereto:

- 2.1 Advertising Standards Authority of South Africa (ASA)
- 2.2 Broadcasting Complaints Commission of South Africa (BCCSA)
- 2.3 Press Ombudsman of South Africa
- 2.4 Independent Communications Authority of South Africa (ICASA)
- 2.5 Protection of Personal Information Act, 2013 (Act No 4 of 2013) (“POPIA”)

3. Scope of Work

This is an all-inclusive media monitoring and analysis service, including print monitoring, broadcast monitoring, online and social media monitoring, and the analysis of the media coverage emerging from these platforms. Bidders are also required to produce on request from SARS any ad hoc special reports on topics identified by SARS.

3.1 News Monitoring

Monitoring services will require the successful bidder to monitor all major electronic news providers (including broadcast and online news sites), as well as daily, weekly or monthly print titles, including regional titles, community newspapers, major national newspapers, magazines, trade journals and periodicals (print media). The successful bidder will carefully monitor the electronic news sites and print media using a combination of keywords that SARS will provide to the successful bidder.

Daily monitoring of news media must result in the relevant articles, links and video clips being electronically distributed to SARS in an all-encompassing Coverage Report, at least three (3) times a day, via e-mail at 07:45, 12:00 and 16:00. In addition, 24-hour access to digital and/or PDF versions of the relevant articles, video clips or links must be provided via a portal created for SARS. Technical support (for the portal) should be available to SARS 365 days/ 24/7 hours.

The Encompassing Coverage Report should make provision for the following:

- Updated contact (email addresses) list of mainstream media houses (broadcast, print & digital), local print, community radio and regional digital media platforms on regular quarter intervals throughout the existence of the contract.
- Easily accessible and fast colour PDF-file format of articles.
- Listing of articles under headlines as they appear in the media, accompanied by short introductory summaries.
- Archiving of the articles listed.

- Electronic access to all content via portal, which includes a fully searchable archive of the SARS and other relevant articles that are provided daily via e-mail summaries, accessible to SARS officials 24 hours a day (including over weekends); and
- Full access to subscription content.

3.2 Broadcast Monitoring

Monitoring must include all television and radio news broadcasts, television and radio programmes including phone-in programmes and digital online platforms, which must be monitored daily.

The Encompassing Coverage Report should make provision for the following:

- Easily accessible video and audio clips of the relevant television and radio broadcast. All video and audio clips must be made available on a secure electronic portal for download.
- List of articles, PDF versions and links to articles under headlines as they appear in the media, accompanied by short introductory summaries at least three (3) times a day, namely 07:45, 12:00 and 16:00.
- An SMS notification sent to designated SARS officials of significant radio and television broadcasts under way in accordance with keywords provided by SARS, and/or relating to tax, Customs and Excise or other major issues or senior officials of SARS, the Minister of Finance and Deputy Minister.
- The successful bidder must, upon request, provide SARS with copies of radio or television broadcasts via easily downloadable channels—such as WeTransfer or the dedicated electronic portal—within 6 to 12 hours after broadcast.

3.3 Social Media Monitoring

Daily monitoring must include social media interfaces such as Facebook, Twitter, LinkedIn, Instagram, YouTube, TikTok, websites, blogs, podcasts, and chat rooms for content that involves the work of SARS.

The Encompassing Coverage Report should make provision for the following:

- Daily reports with headlines, summaries, and electronic access to content via e-mail three (3) times a day, namely at 07:45, 12:00 and 16:00 of all relevant articles published on social media.
- Access to social media tracking dashboard including analytics, heat maps, demographic information, location, statistics, and searchable archives.
- Early warning of trending topics that might affect the SARS brand.
- Quality control of sentiment and summaries
- Duplicate/noise removal

3.4 Artificial Intelligence and Human Quality Assurance

Where artificial intelligence, machine learning, natural language processing or automated classification tools are used in the delivery of the services, the successful bidder must clearly describe the functionality of such tools and demonstrate how these will enhance the speed, relevance and quality of media monitoring, analysis and alerting services provided to SARS. The use of such tools must support, and not replace, qualified human analyst review.

- The bidder must indicate which functions are automated, including but not limited to summarisation, sentiment analysis, topic clustering, anomaly detection, keyword expansion and trend identification.
- All AI-generated summaries, sentiment classifications, reputational risk flags and strategic insights submitted to SARS must be subject to human analyst oversight and validation prior to dissemination, particularly for high-risk, sensitive or fast-moving matters.
- The bidder must apply quality assurance controls to reduce false positives, duplicate items, irrelevant content and inaccurate sentiment or topic classifications.
- The bidder must disclose the processes in place to test, calibrate and improve the accuracy of automated outputs, including escalation procedures where automated outputs are uncertain, contradictory or potentially misleading.

NB: The requirement for human analyst oversight must be applied across all media monitoring outputs. This includes print, broadcast, online and social media platforms. A designated and suitably qualified resource must be assigned responsibility for the review, validation and approval of all reports and outputs prior to submission to SARS. This is to ensure the accuracy, relevance, completeness and alignment of all outputs with SARS's strategic, operational and reputational requirements.

3.5 Crisis Escalation and Early Warning

The successful bidder must provide SARS with a formal early warning and crisis escalation capability to identify, assess and escalate emerging issues, negative narratives, misinformation, unusual spikes in coverage, and fast-moving developments that may have strategic, operational or reputational implications for SARS.

- The bidder must define and document crisis and escalation thresholds, including what constitutes a critical, high, medium or routine issue, and the criteria that trigger immediate notification to SARS.
- The bidder must provide immediate alerts to designated SARS officials by agreed channels, which may include e-mail, SMS and telephone, for critical or high-risk issues identified outside normal reporting cycles.

3.6 Media Analysis and Trends

Analysis of reports and coverage from print, broadcast and online media must be done on a daily, weekly, monthly, quarterly, and annual basis as well as per ad hoc request where for example if analysis is required on a trending, topical or extensively reported issue related to SARS.

The Analysis Report must include:

- **Quantitative Analysis**

The media content analysis must include a quantitative measurement of actual coverage received via social media, news media, online media including broadcast per item, as well as the estimated reach of articles per publication/platform by region and lifestyle measurements (LSM).

- **Qualitative Analysis**

The media content analysis report must include qualitative analysis of the key issues covered in the media that is of relevance to SARS, i.e., public perceptions of the key issues that involve SARS as expressed by media commentators, stakeholders and taxpayers in the media, the burning issues, nature of coverage (positive, negative, or neutral) as well the strategic and reputational impact of such coverage on SARS.

The quantitative and qualitative analysis reports should identify and highlight reporting trends, comparative trend analysis for all previous periods, possible news angles and potential reputational risks, with a view to providing strategic insight. It should also identify the key journalists and media houses covering these issues.

In addition, to the daily, weekly, monthly, quarterly, as well as ad hoc special reports, SARS also requires an annual review, coinciding with the financial year end that reflects details of the above quantitative and qualitative analysis over a twelve (12) month period from April to March.

3.7 Formats and time frame of submission of the reports

Reports must be submitted electronically in PDF colour file format and must be retrievable from archives. The time frame for submission of the reports is as follows:

- Daily executive summary of the SARS highlights delivered at 08:00 every morning (a 24-hour cycle) excluding weekends and holidays.
- Monthly qualitative and quantitative analysis report – two (2) working days after month-end;
- Quarterly qualitative and quantitative analysis report – seven (7) working days after every quarter;
- Annual qualitative and quantitative analysis report – fourteen (14) working days after the SARS financial year end; and

- Ad hoc (national, provincial / regional and SARS branch geographical area of influence) qualitative and quantitative analysis report – within twenty-four (24) hours of a request from SARS.

3.8 Special Analysis Report

The successful bidder shall provide SARS with the following special analysis reports:

- A comprehensive report on the annual filing season for individuals to be delivered within seven (7) working days of the end of filing season.
- A comprehensive report on the filing season for employers to be delivered within seven (7) working days of the end of tax season for employers.
- A comprehensive report on the annual Revenue Announcement at the end of the financial year (March) to be delivered within 10 (ten) days of the announcement.
- Comprehensive report on campaign specific programs that SARS may request delivered within seven (7) working days of the end of that campaign.
- Ad-hoc reports as and when required.

3.9 Technical Support

The successful bidder must provide technical support for 365 days/ 24/7 hours regarding the access and usage of the electronic portal where articles (print or online) and broadcast items are stored.

3.10 Quarterly Supply Reviews

SARS and the successful bidder shall convene on a quarterly basis to review supplier performance and address issues that arise.

4. SARS REQUIREMENTS FROM BIDDER

The bidders are required to submit their response to all the information in this section. The information will be used for technical evaluations.

4.1 Company Profile and Resources

The bidders must provide in their response a company profile detailing:

- Years of experience in rendering Media Monitoring and Analysis Services.
- Organogram with clearly defined roles for each individual of the Media Monitoring and Analysis Unit that will be assigned to SARS.
- Number of key personnel that are being recommended to work on SARS account and their level of expertise, responsibilities, qualifications, and competencies relevant to the scope of work; and
- The full contact details (landline, cell phone and email address) of the key contact person / key Account Manager who will be assigned to SARS, including his/her qualifications, role and responsibilities. Attach a signed CV detailing the relevant experience.

4.2. System Live Demonstration

- The bidder must conduct a live online demonstration of the proposed media monitoring platform. The demonstration must show how the platform monitors media coverage, searches and filters content, generates alerts, displays dashboards, exports information and produces reports relevant to SARS. Pre-recorded videos, screenshots and slides may support the presentation but will not replace the live demonstration, unless SARS determines otherwise due to technical difficulties outside the bidder's control.
- The bidder must present and explain sample media monitoring and analysis outputs during the online presentation, including daily or weekly monitoring output and monthly, quarterly or annual analysis reports. The samples must show how the bidder reports quantitative metrics, qualitative insights, sentiment, key issues, trends and reputational impact.
- The bidder must present its service continuity, risk management and escalation approach for maintaining uninterrupted media monitoring and analysis services, including how urgent reputational risks will be identified, escalated and reported to SARS.

Notes:

- Firstly, it is essential that bidders provide a demonstration of an interactive real-time media monitoring platform they intend to use, such as Meltwater or Brandwatch—though other platforms are also acceptable. In addition, bidders should make themselves available for an onsite inspection, allowing us to assess their capabilities firsthand.
- Furthermore, access to the system must be granted, and the platform should enable us to search through archived data efficiently.
- Technical Support - Ensure technical training and after hours/weekend support/response to SARS officials regarding accessing an electronic portal where articles (print or online) and broadcast items are stored, as well as the online editorial, that enables navigation of summaries provided to SARS.

4.3 Testimonial / Reference Letters

The bidder must submit evidence of at least three (3) completed or current contracts/projects where the bidder provided media monitoring and/or media analysis services within the past five (5) years.

- For each contract/project submitted, the bidder must provide verifiable proof such as a client reference letter, appointment letter, purchase order, signed contract, service level agreement, completion certificate or written client confirmation.
- Each reference must clearly indicate the client organisation, contact person, designation, email address, telephone number, description of services provided, contract/project period, and confirmation that the bidder rendered media monitoring and/or media analysis services.
- SARS reserves the right to verify submitted references by contacting the listed client or requesting further supporting documentation.

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