

## Description of the service needed - Tax Health Assessment

### 1. Scope of work

Provide tax health assessment to identify potential exposures and recommend solutions, recommend system and process improvements and identify tax planning opportunities.

Below are the key components of the scope of work:

1. Analysing transactions using advance data analytics and technology
2. Review of records and returns
3. Review of current tax planning strategies
4. Compliance review

The tax health assessment review is required for taxes below:

Eskom Holdings SOC Ltd.

1. Income Tax
2. VAT
3. PAYE
4. Customs duties
5. Environmental levy
6. Carbon tax
7. Withholding tax on interest

National Transmission Company South Africa

1. Income Tax
2. VAT
3. PAYE
4. Customs duties

### 2. Specification of Product or Goods

Gatekeeper

The tenderer must provide the Names and Tax Practitioner Registration Numbers of the tax practitioners it intends to use to provide the service that are in the employ of the tenderer.

Note: Should the SARS system indicate that any of the provided tax practitioners is not licensed, the tenderer will be considered non-compliant.

The technical evaluation criteria are set out below:

Item	Criteria	Points	Weight
1.	<p><b>Technical experience:</b></p> <p>The tenderer must have demonstrable experience in using advance data analytics and technology to provide tax health assessments.</p> <p>The tenderer must provide a detailed company profile, including, the number of years of experience in providing tax health assessments and the list of benefits derived by the client that is a South African taxpayer company from the tax health assessment.</p> <ul style="list-style-type: none"> <li>• Years of experience more than twenty (20) years (20 points)</li> <li>• Years of experience between fifteen (15) and twenty (20) years (15 points)</li> <li>• Years of experience between ten (10) and fifteen (15) years (10 points)</li> <li>• Years of experience between five (5) and ten (10) years (5 points)</li> <li>• Years of experience below five (5) years (0 points)</li> </ul>	20	20%
02.	<p><b>Complexity - Revenue:</b></p> <p>The tenderer must have demonstrable experience in the provision of tax health assessment services to large and complex South African taxpayer companies as measured by revenue.</p> <p>The tenderer must provide contactable references (i.e. reference letters on clients' letterheads) in respect of the provision of tax health assessment services to South African taxpayer companies.</p> <p>The tenderer must provide a reference from a client with the highest revenue per their latest audited annual financial statements.</p> <ul style="list-style-type: none"> <li>• Revenue more than R300bn (30 points)</li> <li>• Revenue between R200bn and R300bn (25 points)</li> <li>• Revenue between R100bn and R200bn (20 points)</li> <li>• Revenue between R500bn and R100bn (15 points)</li> <li>• Revenue below R50bn (10 points)</li> </ul>	30	30%
03.	<p><b>Complexity - Assets:</b></p> <p>The tenderer must have demonstrable experience in the provision of tax health assessment services to large and complex South African taxpayer companies as measured by assets.</p>	30	30%

	<p>The tenderer must provide contactable references (i.e. reference letters on clients' letterheads) in respect of the provision of tax health assessment services to South African taxpayer companies.</p> <p>The tenderer must provide a reference from a client with the highest total Property Plant and Equipment per their latest audited financial statements</p> <ul style="list-style-type: none"> <li>• Assets more than R900bn (30 points)</li> <li>• Assets between R700bn and R900bn (25 points)</li> <li>• Assets between R500bn and R700bn (20 points)</li> <li>• Assets between R300bn and R500bn (15 points)</li> </ul> <p>Assets below R500bn (10 points)</p>		
<b>04.</b>	<p><b>Management experience:</b></p> <p>The managing executive or partner for each tax type must demonstrate relevant experience.</p> <p>The tenderer to provide the CV of the managing executive or partner for each tax type including years of experience in providing tax health assessments to South African taxpayer companies.</p> <ul style="list-style-type: none"> <li>• Years of experience in providing tax health assessments more than twenty (20) years (20 points)</li> <li>• Years of experience in providing tax health assessments between fifteen (15) and twenty (20) years (15 points)</li> <li>• Years of experience in providing health tax assessments between ten (10) and fifteen (15) years (10 points)</li> <li>• Years of experience in providing tax health assessments between five (5) and ten (10) years (5 points)</li> <li>• Years of experience in providing tax health assessment below five (5) years (0 points)</li> </ul>	<b>20</b>	<b>20%</b>
	<b>Total</b>	<b>100%</b>	
	<b>The minimum technical evaluation threshold</b>	<b>80%</b>	
<b>Tenderers must obtain a minimum of 80% score to qualify for further evaluations. Tenderers that fail to meet 80% minimum threshold will be disqualified and not be evaluated further.</b>			