

CLARIFICATIONS, QUESTIONS AND ANSWERS

RFP06-2026

APPOINTMENT OF A SERVICE PROVIDER FOR PROJECT AND PORTFOLIO MANAGEMENT SYSTEM FOR A PERIOD OF FOUR (4) YEARS.

Communication #2

Date of Issue: 17 JULY 2026

NO.	QUESTION	RESPONSE/CLARIFICATION
1.	CURRENT STATE & BUSINESS OBJECTIVES	
1.	What product or platform is currently being used for Project Portfolio Management?	A highly configured bespoke toolset with a SQL DB. BRS reference: Section 2 of the BRS - Background (current software suite and current state context).
2.	What specific business challenges is SARS experiencing with the current solution?	Current toolset does not meet requirements detailed in the BRS. BRS reference: Sections 1 and 2 of the BRS - Introduction and Background; read with Section 3(a) - Working Software (need for robust end-to-end PPMIS capabilities).
3.	What are the key success criteria that will determine whether the implementation is considered successful after go-live?	a. 100% Successful uptake (administrators, contributors and social users). b. SARS must be able to independently manage and maintain all system related aspects including training. c. Successful month end runs (finances and status reports) without supplier support. BRS reference: BRS Section 3(b)(vi) - Documentation and knowledge transfer; Section 3(c) - Training; Section 5.1 - Training and Knowledge Transfer; Section 5.2 - Transition, acceptance and effective use; and Section 4.1(d)-(e) - Finance Management and Management Reporting.
4.	Are there any business processes that must be retained exactly as currently implemented?	Only the financial practices and standards of SARS will remain the same. This will be shared with the successful bidder during onboarding. Relevant BRS reference: BRS Section 4.1(d) - Finance Management; read with Section 5.3 - SARS Retained Tasks.
5.	Is the objective to standardize project management processes across all business units, or allow departmental variations?	a. The objective is to, as far as possible, standardise on project management practices. b. At the same the Enterprise Project Management Office (EPMO) aims to provide agility and customisability. c. The project management processes are centred in the EPMO only. BRS reference: BRS Section 3(a) - Working Software (scalable and configurable solution); Section 4.1(c) - Project and Programme Management (customisation of governance methodologies); and Section 4.2 - Technical Requirements (configuration capability).
2.	DATA MIGRATION	
1.	What systems contain the project, programme, portfolio, resource, financial, risk, and document data that must be migrated?	a. The current bespoke solution contains project, programme, portfolio, resource, financial, risk, and document data. b. The current document repository (SharePoint portal) contains all project artefacts. c. Remedy contains the incident tracking information. BRS reference: BRS Section 3(b)(ii) - Data migration; Section 3(b)(iii) - Integration with SARS enterprise platforms and tools; and Section 4.2 - Technical Requirements (data import, content/document management, Remedy and related integrations).

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2.	How many active, completed, and archived projects exist?	Since 1 April 2025 to date: a. number of closed projects = 75 b. number of active projects = 125 Projects completed prior to 31 March 2025 will not be migrated. BRS reference: BRS Section 3(b)(ii) - Data migration; and Section 4.1(b) - Portfolio Management (master records and viewing project, portfolio and programme information over multiple years).
3.	How many years of historical data are required to be migrated?	Since 1 April 2025 to date: a. number of closed projects = 75 b. number of active projects = 125 Projects completed prior to 31 March 2025 will not be migrated. BRS reference: BRS Section 3(b)(ii) - Data migration; and Section 4.1(b) - Portfolio Management (viewing project, portfolio and programme information over multiple years).
4.	Are data cleansing and data quality activities the responsibility of SARS or the implementation partner?	It will be the responsibility of SARS to clean the data before data migrating and the responsibility of the supplier to ensure that imported data integrity is maintained. BRS reference: BRS Section 3(b)(ii) - Data migration; Section 4.2 - Technical Requirements (data import capability); and Section 5.3 - SARS Retained Tasks.
5.	Can SARS provide sample datasets for migration estimation purposes?	Yes, desensitised datasets will be provided in due course. BRS reference: BRS Section 3(b)(ii) - Data migration; and Section 4.2 - Technical Requirements (controlled data import capability).
3.	INTEGRATION REQUIREMENTS	
1.	Which integrations are mandatory for go-live, and which can be deferred to later phases?	• SAP BW - Mandatory • Remedy – Not Mandatory • SharePoint - Mandatory • Active Directory / Entra ID - Mandatory • Power BI - Mandatory • Microsoft Project – Mandatory Refer to bidder briefing presentation for integration specifications and Business Requirements Specification document, BRS Section 4.2 - Technical Requirements (Integration, interoperability and information sharing: items a, b, f and g), read with Section 4.1(e) - Management Reporting (Power BI integration).
2.	Can SARS provide a list of the systems requiring integration, including: • SAP • SAP BW • Remedy • HR systems • SharePoint • Documentum	Refer to bidder briefing presentation for integration specifications and Business Requirements Specification document, BRS Section 4.2 - Technical Requirements (Integration, interoperability and information sharing: items a-h).

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	- Active Directory / Entra ID - Power BI - Microsoft Project	
3.	Are APIs available and documented for each target system?	APIs will be shared with the successful bidder at onboarding. BRS reference: BRS Section 4.2 - Technical Requirements (pre-developed APIs and ability to create additional integrations and APIs).
4.	Does SARS have existing middleware or integration platforms that vendors should leverage?	Yes, SARS (IBM) Enterprise Service Bus and IBM MQFTE. BRS reference: BRS Section 4.2 - Technical Requirements (integration, interoperability, automation capability and data exchange); and Section 5.7(b)(ii) - Application Integration Requirements (ESB WebSphere, BizTalk and IBM MQFTE).
5.	Will SARS provide technical resources to support integration testing?	Yes, SARS will provide the necessary resources. Relevant BRS reference: BRS Section 5.2(a) - Testing and quality assurance plan, including QA/UAT; read with Section 5.3 - SARS Retained Tasks.
4.	FUNCTIONAL REQUIREMENTS	
1.	Can SARS provide detailed process maps for: - Demand Management - Portfolio Management - Project Lifecycle Management - Resource Management - Benefits Realization	It is anticipated that the standard supplier solution processes will address most project management requirements. SARS requires the bidders to propose the best fit process maps aligned to the bid requirements. Any other existing SARS information will be provided to the successful bidder. BRS reference: BRS Section 4.1(a) - Demand Management; Section 4.1(b) - Portfolio Management; and Section 4.1(c) - Project and Programme Management.
2.	Can SARS provide examples of current: - Risk registers - Issue logs - Change request logs - RAID logs - Lessons learned registers	SARS requires the bidders to propose the best PPMIS aligned to the bid requirements. Yes, the templates will be provided in due course. BRS reference: BRS Section 4.1(c) - Project and Programme Management (RAIDDW-type logs, change requests, lessons learned, standard templates and governance artefacts).
3.	Are there existing reporting templates that must be replicated?	Yes BRS reference: BRS Section 4.1(e) - Management Reporting; and Section 4.1(c) - Project and Programme Management (system-driven and customisable reporting/templates).
4.	Are there standard governance gates and approval workflows currently in place?	Yes BRS reference: BRS Section 4.1(a) - Demand Management (approval workflows); Section 4.1(b) - Portfolio Management (record validation and approval workflows); and Section 4.1(c) - Project and Programme Management (governance methodologies and conformance).
5.	How many workflow approvals and business processes will require automation?	It is anticipated that the standard supplier solution processes will address most workflow requirements. SARS requires the bidders to propose the best fit process workflow aligned to the bid requirements. Any other existing SARS information will be provided to the successful bidder.

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		BRS reference: BRS Section 4.1(a) - Demand Management (electronic workflows); Section 4.1(b) - Portfolio Management (approval workflows); and Section 4.1(c) - Project and Programme Management (configurable workflows, notifications and validation requests).
5.	RESOURCE & CAPACITY MANAGEMENT	
1.	How is resource capacity currently planned and tracked?	Manually Maintained in a configured Spreadsheet. BRS reference: BRS Section 4.1(b) - Portfolio Management (full resource capacity and capability management).
2.	Are contractors, vendors, and external resources included in resource planning?	Currently this is not maintained, however, this is a PPMIS requirement. BRS reference: BRS Section 4.1(b) - Portfolio Management (resource allocation, scheduling and availability); and Section 4.1(c) - Project and Programme Management (EPMO resource allocation management and work packages).
3.	Is skills-based resource allocation required?	Yes, however, only for core and critical skills. BRS reference: BRS Section 4.1(b) - Portfolio Management (skills/capacity heat maps, constraints and bottlenecks); read with Section 4.1(c) - Project and Programme Management (resource allocation).
4.	Does SARS require scenario planning and resource forecasting capabilities?	Yes - as per the Business Requirement Specifications, BRS Section 4.1(b) - Portfolio Management (scenario planning; resource capacity and capability management; forecasting vs actual utilisation).
5.	Are timesheets required, and if so, at what level of detail?	Currently this is not maintained, however, this is a PPMIS requirement. BRS reference: BRS Section 4.1(b) - Portfolio Management (ability to track time via timesheets).
6.	REPORTING & ANALYTICS	
1.	Can SARS provide examples of executive dashboards currently used?	SARS requires the bidders to propose the best PPMIS aligned to the bid requirements. Yes, the desensitised datasets will be provided in due course. BRS reference: BRS Section 4.1(b) - Portfolio Management (visual dashboards and RAG status views); Section 4.1(c) - Project and Programme Management (health indicator dashboards); and Section 4.1(e) - Management Reporting.
2.	Which reports are considered mandatory for go-live?	a. Progress (Weekly & Monthly) b. Dashboards c. Governance d. ERAIDDW e. Project Status BRS reference: BRS Section 4.1(e) - Management Reporting; read with Section 4.1(c) - Project and Programme Management (governance artefact reporting and health indicators) and Section 4.1(d) - Finance Management.
3.	What Power BI licensing currently exists?	a. PowerBI desktop b. PowerBI server BRS reference: BRS Section 4.1(e) - Management Reporting (Power BI integration); Section 4.2 - Technical Requirements (business intelligence platform integration); and Section 5.6 - Licencing Packages.

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4.	Is self-service report creation required for business users?	Self-service report creation will be role based to a limited group of users in the EPMO. BRS reference: BRS Section 4.1(e) - Management Reporting (dynamic on-demand reports, slice-and-dice/drag-and-drop reporting and configurable reporting metrics).
5.	What reporting refresh frequencies are required?	Refer to the Business Requirement Specifications document, BRS Section 4.1(e) - Management Reporting (report scheduling and up-to-the-minute real-time reports), read with Section 4.2 - Technical Requirements (real-time or near real-time data updates).
7.	MICROSOFT PLATFORM & LICENSING	
1.	Can the solution be implemented within the SARS Microsoft tenant?	Yes, preferred by SARS BRS reference: BRS Section 4.2 - Technical Requirements (integration with Microsoft platforms, Active Directory, Microsoft Project, MS Teams and standard browser access).
2.	What Microsoft licenses currently exist for: - Project Plan 3 - Project Plan 5 - Power Platform Premium - Power BI Pro - Power BI Premium - Microsoft 365	a. Microsoft Project – Yes b. Microsoft Power BI – Yes c. Microsoft 365 - Yes BRS reference: BRS Section 4.1(e) - Management Reporting (Power BI integration); Section 4.2 - Technical Requirements (Microsoft Project, MS Teams and BI integrations); and Section 5.6 - Licencing Packages.
3.	Are third-party SaaS solutions permitted if hosted in approved regions?	Yes, they are allowed, providing data is restricted to within South African borders. BRS Section 3(a) - Working Software, read with Section 4.2 - Technical Requirements (cloud-based deployment with South African data residency).
4.	Does SARS require all solution data to remain within South Africa?	Refer to the Business Requirement Specifications, BRS Section 4.2 - Technical Requirements (cloud-based deployment with South African data residency), read with Section 5.7(a) - Cloud-based deployment (South African data residency).
5.	Are partner implementation licenses available during the project?	Yes BRS reference: BRS Section 5.6 - Licencing Packages (licensing model and related pricing structure, with true-up/additional licensing volumes).
8.	SECURITY & COMPLIANCE	
1.	Can SARS provide its security architecture requirements?	Yes, SARS will share the security architecture with the successful bidder at onboarding. BRS reference: BRS Section 4.2 - Technical Requirements (POPIA and SARS Security policies); and Section 4.1(f) - Security and User Management.
2.	Are there specific audit or compliance obligations beyond POPIA?	Yes, the Public Finance Management Act and National Archives including any other relevant legislation in the Republic of South Africa. BRS reference: BRS Section 4.2 - Technical Requirements (legislative and governance compliance, POPIA and SARS Security policies).
3.	What audit trail retention period is required?	According to the National Archives prescripts project records have to be maintained for 20 years.

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		BRS reference: BRS Section 4.1(f) - Security and User Management (audit trails, logging and monitoring); Section 4.1(c) - Project and Programme Management (archiving of project data); and Section 4.1(b) - Portfolio Management (retention of records of changes over time).
4.	Are there specific penetration testing requirements?	Yes, penetration tests requirements will be implemented internally by SARS. BRS reference: BRS Section 4.2 - Technical Requirements (data protection and SARS Security policies); and Section 5.2(c) - routine software updates and patches to fix bugs and security weaknesses.
5.	What authentication and SSO standards are mandated?	Microsoft Active Directory BRS reference: BRS Section 4.1(f) - Security and User Management (Active Directory SSO); and Section 4.2 - Technical Requirements (integration with SARS user directory/Active Directory).
9.	TRAINING & ADOPTION	
1.	How many users require training by role?	a. System Admin = 5 b. Centre of Excellence super-users = 5 c. Junior Project Manager, Project Managers and Senior Project Manager = 75 d. Portfolio Managers = 8 e. Project Coordinators = 24 BRS reference: BRS Section 5.1 - Training and Knowledge Transfer (110 contributors and 5 administrators for year 1); and Section 3(c) - Training.
2.	Does SARS prefer a. Train-the-trainer b. Instructor-led training c. E-learning d. Learning Management System integration?	a. Train-the-trainer – First b. Instructor-led training - Second c. E-learning – Third d. Learning Management System integration? - Yes BRS reference: BRS Section 3(c) - Training (in-person workshops, virtual sessions, user manuals and on-demand learning materials); and Section 5.1 - Training and Knowledge Transfer (multiple formats and sustainability plan).
3.	What level of post-go-live hypercare is expected?	LOW (SARS working hours and extended hours availability as per the BRS). Refer to BRS Section 5.2(b) - support services during business hours and extended hours on working days.
4.	Is knowledge transfer required for technical administrators?	Yes. Refer to BRS Section 5.1 - Training and Knowledge Transfer, read with Section 3(c) - Training.
10.	COMMERCIAL & IMPLEMENTATION	
1.	What is the expected implementation timeline?	6 – 8 months BRS reference: BRS Section 5.4 - Implementation Approach (high-level end-to-end project schedule reflecting activity sequencing and implementation timelines).
2.	Is a phased implementation acceptable?	Yes, in line with Agile Principles. BRS reference: BRS Section 5.4(a) - Project management methodology; read with Section 4.1(c) - Project and Programme Management (predictive/adaptive/hybrid/agile governance methodologies).

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3.	Are there preferred milestones or mandatory delivery dates?	No, however, implementation need to be coordinated in line with the Operational Scheduling Calendar (Enterprise Master Plan) to be discussed with the successful bidder. BRS reference: BRS Section 5.4 - Implementation Approach (project schedule and activity sequencing); and Section 4.1(b) - Portfolio Management (EPMO master schedule/plan and enterprise calendar).
4.	What SARS resources will be allocated to the project?	a. A project sponsor b. A project owner c. Project manager (for SARS specific deliverables). d. Project administrator e. Subject matter experts f. Technical resource g. Agile Coach h. Testers BRS reference: BRS Section 5.3 - SARS Retained Tasks; and Section 5.4(c) - Project team composition (EPMO).
5.	What are the acceptance criteria for each phase?	Sign off as per SARS specific deliverables and milestones to be defined during implementation with the successful bidder. BRS reference: BRS Section 5.2 - Transition, acceptance and effective use of the new system; and Section 5.4 - Implementation Approach.
6.	How will scope changes be managed during implementation?	The change request process (templates, approvals etc) BRS reference: BRS Section 4.1(c) - Project and Programme Management (change requests captured and managed per initiative); and Section 5.4(a) - Project management methodology.
11.	ADDITIONAL STRATEGIC QUESTION	
	Would SARS be willing to participate in a detailed solution discovery and requirements workshop prior to implementation in order to validate business processes, integration scope, migration approach, reporting requirements, and licensing assumptions?	No, not during the tender process. SARS will only engage the successful service provider during onboarding. BRS reference: BRS Section 3(b) - Professional services (configuration, migration, integration, change management and implementation support); and Section 5.4 - Implementation Approach. The Q&A response clarifies that such engagement will occur only with the successful bidder during onboarding.