SARS RFP 04-2026

THE APPOINTMENT OF A SERVICE PROVIDER FOR THE PROVISION OF CUSTOMER INSIGHTS PLATFORM (INCLUDING CUSTOMER EXPERIENCE AND RESEARCH COMPONENTS) FOR A PERIOD OF THREE (3) YEARS.

BUSINESS REQUIREMENTS SPECIFICATION

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Business Requirements Specification (BRS)

1. Background

The South African Revenue Service (SARS) aims to enhance voluntary compliance and modernize service delivery through data-driven strategies, as outlined in Strategic Objective 5 ("Increase and expand the use of DATA") and Strategic Objective 6 ("Modernise the organisation's systems to provide digital and streamlined services").

To achieve this, SARS has collected over three million taxpayer responses using its existing survey and research platform over the past several years. The platform has also been used to conduct surveys internally and externally. The insights generated from the data collected using the platform have informed improvements in service channels such as eFiling and the MobiApp, guided taxpayer education initiatives, and supported research into compliance behaviour, taxpayer public opinions, employee sentiments, and the cost of compliance.

2. Business requirement summary

While the existing platform has significantly enhanced SARS's ability to gather customer experience insights and conduct research, it presents several operational and strategic limitations. Key challenges lie in:

- **Manual processing of large volumes of qualitative data**, which has introduced delays, inconsistencies, and constrained the generation of timely, actionable insights. This inefficiency has limited SARS's ability to personalize services, optimize resource deployment, and manage compliance in a responsive manner.
- **Fragmented use of separate modules** also hinders the ability to link customer experience data with underlying strategic research related to perception, policy, or process-related issues, restricting the organization's capacity to generate deeper insights and coordinate interventions across the taxpayer journey.

To address these limitations, SARS requires a next-generation Customer Insights Platform to replace its expiring solution and to address critical operational and strategic gaps. The platform should enable SARS to gauge the full customer and employee feedback lifecycle—from data collection to insight generation and service recovery. The platform should further enable automated, real-time data collection, AI-powered trends and sentiment analysis, and seamless integration with SARS systems to support data-driven decision-making, proactive service improvements, and taxpayer-centric compliance strategies.

The solution should improve the efficiency and accuracy of data collection and analysis, positioning SARS as a data-driven, taxpayer-centric organization and facilitating a crucial shift from reactive to proactive service design and decision-making. This platform will also be utilized for SARS psychometric assessments for internal employee evaluation, focusing on behavioural traits, cognitive abilities, and alignment with organizational values, supporting talent management, development needs, employee engagement, and continuous improvement. The acquisition of this new platform is a key enabler for the modernization of SARS's systems and processes, leading to enhanced voluntary compliance, improved taxpayer experiences, stronger employee engagement, and increased operational efficiency.

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This procurement is for a three-year period, covering full implementation, operation, support, migration and enhancement of the Customer Insights Platform. The service provider must deliver sustained system availability, data accuracy, and platform optimisation throughout the contract term.

3. Scope and Objective

3.1. Scope

This Business Requirements Specification outlines the requirements for the procurement and implementation of a comprehensive Customer Insights Platform for SARS. The platform must support the full lifecycle of customer insight generation—including survey design, feedback collection, data analysis, reporting, and strategic decision support.

The solution must enable SARS to:

- Design and deploy surveys to employees, traders and taxpayer segments across multiple channels (e.g., email, SMS, digital platforms, QR codes).
- Capture feedback across the taxpayer journey (e.g., registration, filing, payment, dispute resolution, service interaction).
- Analyse both structured and unstructured data through AI-enabled capabilities.
- Integrate feedback with internal operational data for a connected view of service performance.
- Provide real-time, actionable insights through dynamic and integrated dashboards.
- Automate service recovery processes where necessary.
- Manage user access securely and in compliance with internal governance and legislative frameworks.

The platform must be fully integrated, scalable, secure, and aligned to SARS's data management, security, and privacy policies. It must replace the current expiring solution by **11 October 2026** and support future growth in volume, complexity, and organisational insight needs.

3.2. Objectives

The primary objectives of this procurement are to:

- **Ensure Continuity of Insight Generation:** Prevent disruption of taxpayer feedback collection and reporting due to the expiry of current tool licenses.
- **Enhance Efficiency:** Replace manual, fragmented processes with automated, real-time insight generation.
- **Improve Decision Support:** Provide SARS with a central, consolidated platform for strategic and operational insights across taxpayer segments and touchpoints.

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- **Support Proactive Service Improvement:** Enable real-time detection of issues and sentiment to trigger timely service recovery and improvement actions.
- **Enable Integration:** Facilitate seamless integration with SARS systems, including the data warehouse, digital channels, and internal reporting environments.
- **Ensure Compliance:** Align with POPIA, internal data protection policies, and national ICT standards.
- **Promote Organisational Adoption:** Provide governance controls, training, and strategic support to encourage sustained platform usage across SARS.

4. Functional Requirements

The proposed Customer Insights Platform must include the following core functional capabilities:

4.1. Survey Design and Configuration

- Support for both pre-built and customisable survey templates, including dynamic question logic based on user input.
- Ability to design surveys for multiple traders, taxpayer segments and employees, covering transactional and strategic feedback needs.
- AI-Adaptive Survey Flow: The platform must support AI-driven adaptive survey paths, allowing questions to be skipped or added dynamically based on previous responses. This should support deeper probing where needed and streamline the respondent experience
- Surveys are expected to typically range between 5 and 30 questions, with the platform capable of supporting large surveys of up to 90 questions approximately per survey, inclusive of dynamic and conditional logic.

4.2. Survey Distribution

- Automated survey distribution via email, SMS, QR code, web pop-ups, social media, and other SARS digital platforms, based on pre-defined business rules.
- Manual survey distribution option for targeted feedback campaigns.
- Must be capable of handling large volumes of simultaneous survey distributions without email throttling or significant delays, ensuring efficient delivery during peak campaign periods.
    - 50 000 per campaign
    - 1 million over 24-hour period
- Single directory feature for centralised contact management and respondent history.
- Frequency controls to manage respondent fatigue and avoid over-surveying.

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- All functionality and costs associated with survey distribution and messaging channels (including, but not limited to Email, SMS, QR code, web pop-ups, and other SARS digital distribution mechanisms) must be included in the platform.

4.3. Data Capture and Feedback Collection

- Real-time data collection from all channels with immediate routing into a central repository.
- Support for structured (e.g., multiple-choice) and unstructured (e.g., open text) feedback inputs.
- Compatibility with mobile and desktop devices.
- The platform must be capable of handling a minimum of 3 million survey responses per annum, with flexibility to scale beyond this volume based on future operational needs.

4.4. Data Management and Analysis

- Centralised storage of all research and feedback data with searchable access.
- Tools for cross-project meta-analysis to identify trends and correlations across datasets.
- Advanced AI-enabled sentiment analysis, open-text summarisation, and predictive trend identification.

4.5. Reporting and Dashboards

- Customisable dashboards with real-time visualisation (graphs, charts, tables) by user role and business area.
- Ability to combine multiple datasets to surface shared themes or duplicate issues.
- Dashboards must reflect survey findings and calculations in near real time, without the need to manually add questions post-collection or wait extended periods for data to render.
- The platform must generate AI-derived themes and summarised insights from collected feedback and allow these insights to be pinned to dashboards automatically, providing immediate visibility for decision-makers.

4.6. Service Recovery and Feedback Loops

- Capability to trigger service recovery workflows based on predefined feedback thresholds (e.g., low satisfaction scores).
- Ability to link individual feedback to specific touchpoints for issue tracking and escalation.

4.7. User and Access Management

- Secure role-based access control, audit trails, and permissions configuration.

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- Administrator console for managing users, teams, business units, and data visibility levels.
- Support for user activity logging and compliance tracking.

4.8. Integration and Interoperability

- Integrate with SARS's (EDW) enterprise data warehouse and other workflow integration. This includes support for both real-time data ingestion and batch data exchange for historical data synchronization and reporting.
- Embedding options (e.g. iframe support) for inserting surveys or dashboards in existing SARS digital interfaces (eFiling, MobiApp, WhatsApp, USSD and the SARS website).
- Interoperability with external tools (e.g. Microsoft AI assistant, CRM, IVR/voice platforms).
- The bid should highlight API capabilities, including, but not limited to supported standards (e.g., RESTful APIs, Webhooks), authentication mechanisms, and data formats for exchange (e.g., JSON, XML).
- The above will ensure the following mandatory integration capabilities: Response collection & export, embedded data & personalisation, distribution management and workflow integration.
- The platform must demonstrate the capability to support multiple concurrent integrations of varying scale and complexity, without reliance on a fixed or predefined number of integration points.

4.9. Data Migration

- Capability to import and export historical data, metadata, and dashboards from the existing platform, comprising approximately several million historical survey responses. This includes, but is not limited to:
    - Survey responses: XLSX, CSV and other flat file formats for historical survey responses.
    - Metadata: XLSX, CSV and other flat file formats for survey attributes, respondent demographics, and distribution details.
    - Dashboard Configurations: Ability to replicate or import key elements of SARS existing dashboard structures.
- Preservation of all legacy datasets for continuity in analysis and reporting, ensuring no loss of historical insights during the transition.
- For planning purposes, the estimated migration volume is in the region of ±4 million historical survey responses, inclusive of free-text, scoring, and demographic data, subject to validation during detailed migration planning.
- Preference will be given to bids that can demonstrate experience in migrating historical data and insights from other platforms to their solution.

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4.10. Training and Support

- Training:
    - Provision of formal training and certification for administrators and end users, where:
        - Bidders are expected to provide training services on a flexible and agile basis. For context, the current baseline training cohort is aligned with the active user base, which is presently estimated at approximately 40 users. However, the proposed solution must support an agile approach to training, accommodating “as and when” requirements that may arise throughout the duration of the contract period.
        - The actual size of the training cohort over the contract’s duration will be determined solely at SARS’ discretion, based on operational needs, and communicated to the bidder as and when required.
        - SARS will compensate only for the actual number of users trained and will not be limited to the current estimated user base.
        - Training must be delivered through appropriate channels, including online and/or in-person formats, depending on SARS business needs.
- **Support:**
    - Access to post-sales technical support, platform optimisation services, and strategic advisory to align insights with SARS priorities.
    - The Bidder shall be fully responsible for the provision, hosting, and ongoing management of the customer survey platform. The solution must be hosted within the Bidder’s environment (or approved cloud infrastructure) and must not require any hosting or infrastructure provisioning by SARS.
    - All costs associated with the hosting, licensing, configuration, maintenance, and operation of the customer survey solution must be fully included in the Bidder’s quoted price. No additional or separate costs will be accepted by SARS post contract award.

5. Non-Functional Requirements

The Customer Insights Platform must meet the following non-functional requirements to ensure system reliability, scalability, compliance, and ease of use within SARS's operating environment:

5.1. Usability

- The platform must have an intuitive, user-friendly interface for survey creation, distribution, and dashboard configuration.

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- Must support ease of use for non-technical users while still offering advanced configuration options for power users.

5.2. Availability and Uptime

- The platform must deliver a minimum of 99.9% uptime excluding scheduled maintenance.
- Redundancy and failover mechanisms must be in place to ensure service continuity.

5.3. Scalability and Performance

- The platform must be capable of handling **a minimum of 3 million** survey responses per annum, with flexibility to scale beyond this volume based on future operational needs.
    - Scale to accommodate **20% annual growth** in response capacity.
- The platform must support high volumes of concurrent users, survey submissions, and data processing without degradation of performance.
- The solution must allow for unlimited number of user access across the organisation, with **no licensing constraints on the number of platform users, administrators, or viewers**.

5.4. Security and Data Protection

- Full compliance with POPIA, SARS internal information security policies, and other applicable data privacy legislation.
- Encryption of data in transit and at rest, including access to any cloud components.
- Support for role-based access control, user authentication, and audit logging.

5.5. Interoperability and Integration

- The platform must support API-based integration with SARS's internal systems and data infrastructure.
- Seamless interoperability with SARS's existing technologies, including identity and access management (IAM), digital service channels, and analytics environments.

5.6. Maintainability and Support

- The solution must offer regular software updates, maintenance patches, and security upgrades with minimal disruption.
- Post-implementation support must include a clearly defined Service Level Agreement (SLA), technical helpdesk, and platform optimisation advisory.

5.7. Data Portability and Exit Strategy

- SARS must retain full ownership of all data collected and stored on the platform.
- The provider must ensure secure export and transfer of all SARS data upon contract termination, including metadata, configurations, and historical dashboards.

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- SARS must be provided with a certificate of data disposal confirming alignment with POPIA, ISO 27001, and SARS Records Management policies.

5.8. Audit and Governance

- The platform must generate audit trails of all user activities and data access actions.
- Ability to produce audit-ready logs and access reports on demand for compliance monitoring.

6. Asset Inventory

The Customer Insights Platform is required to host, manage, and integrate data from various SARS assets and taxpayer touchpoints to create a comprehensive view of the taxpayer journey. The assets to be covered by this solution, which must **be off-premises and cloud-based**, include, but are not limited to:

- Taxpayer, trader and employee Feedback Data: This encompasses all feedback collected through various channels, including exploratory studies, eFiling and MobiApp surveys, and feedback via the SARS Online Query System and employee psychometric assessments.
- Survey Data (Qualitative and Quantitative): All historical and future survey responses, including open-text responses, collected from various segments.
- Customer Experience Metrics Data: Data associated with Customer Satisfaction (CSAT), Net Easy Score (NES), and Net Promoter Score (NPS) metrics.
- Operational Data from SARS Systems: Data from core SARS systems that can be integrated with feedback data to provide a connected view of the taxpayer journey across key touchpoints. This includes, but is not limited to, data related to:
    - Registration processes
    - Filing processes (e.g., eFiling, MobiApp)
    - Payment processes
    - Dispute resolution
    - Service interactions via service agents, eFiling, and MobiApp transactions and website interaction.
- Historical Data and Insights: Secure migration and preservation of all existing historical data and insights to the new platform to ensure continuity and organizational knowledge retention.
- Employee Psychometric Assessment Data: Data generated from psychometric assessments conducted for internal employee evaluation, focusing on behavioural traits, cognitive abilities, and alignment with organizational values.
- Contact Lists/Directories: A single, consolidated respondent management system that supports segmentation and adherence to established distribution guidelines, aiming to manage

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respondent fatigue by reducing the frequency of surveys sent to the same taxpayer.

- Dashboards and reports: Dashboards and reports currently used for customer experience, research and management reporting, forming part of the existing reporting and insights assets base to be replicated or re-configured where required within the proposed platform.

7. Risk Assessment and Prioritization

Below is a prioritized assessment of key risks, their potential impact, and recommended mitigation strategies

Key risks include:

- Data Security and Privacy Breaches: The platform will handle sensitive taxpayer and employee data. A breach could lead to significant reputational damage, financial penalties, and loss of public trust.
    - Prioritization: High. Requires stringent security controls, encryption (in transit and at rest), role-based access control, and adherence to data privacy regulations such as POPIA.
- Loss of Data Collection Capabilities: Failure to procure and implement a new platform before the current license expires which will result in the loss of essential data collection capabilities.
    - Prioritization: Critical. This risk directly impacts SARS's ability to monitor leading indicators and make informed, data-driven decisions. Requires aggressive project timelines and contingency planning.
- Data Migration Issues: Challenges in securely and seamlessly migrating historical data and insights to the new platform could lead to data loss or integrity issues.
    - Prioritization: High. Requires detailed migration plans, data validation processes, and vendor expertise in secure data transfer.
- Integration Failures: Inability to seamlessly integrate with existing SARS systems and data warehouses could hinder the comprehensive view of the taxpayer journey and real-time data flow.
    - Prioritization: High. Requires thorough compatibility testing and robust API capabilities from the chosen solution.
- User Adoption and Training Gaps: Insufficient training or resistance to adopting the new platform by internal administrators and users could limit optimal platform use and adoption.
    - Prioritization: Medium. Requires comprehensive training and certification programs as part of the vendor's offering.
- Inaccurate or Inconsistent Insights: If the platform fails to provide automated analysis, AI-powered trend and sentiment analysis, or cross-project meta-analysis tools, it could lead to unreliable insights.
    - Prioritization: Medium. Requires thorough testing and validation of the platform's

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analytical capabilities.

Prioritization will guide resource allocation and mitigation strategies, with critical and high-priority risks receiving immediate and continuous attention throughout the procurement and implementation phase

8. Feedback collection frequency and timing

The platform must support flexible survey scheduling while maintaining governance over distribution frequency to minimise respondent fatigue. This includes the following:

8.1. Automated feedback triggers

- The platform must support event-based triggering of surveys linked to taxpayer interactions such as:
    - Completion of eFiling or MobiApp transactions
    - Service encounters at branches or contact centres
    - Resolution of complaints or service queries
    - System outages or communication campaigns

- Triggers must be rule-based, with customisable logic to determine when and how surveys are issued.

8.2. Manual scheduling and ad hoc surveys

- SARS must be able to manually configure and launch surveys for specific research purposes, pilots, or rapid-response scenarios (e.g. public campaigns, system changes).

- Manual surveys must allow for flexible timing (e.g., one-off, daily, weekly) and support targeted respondent groups.

8.3. Frequency management

- The platform must include built-in survey frequency control functionality to:
    - Prevent over-surveying of individual taxpayers within a defined time window.
    - Apply global or campaign-specific limits to survey distribution by segment.
    - Track contact history to enforce adherence to contact governance rules.

8.4. Monitoring and adjustments

- The system must provide dashboards and logs showing survey send dates, triggers, delivery outcomes, and response timestamps.

- SARS administrators must be able to adjust frequency settings and triggering rules in real time based on business needs and engagement patterns.

8.5. Real-time distribution and collection

- Surveys must be sent immediately following defined events or triggers, without delay, to ensure relevance and recency.

- Responses must be captured and reflected in reporting dashboards in near real-time to

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enable timely action by relevant SARS stakeholders.

9. Reporting and Metrics

The platform must be able to support the generation of both high-level management reports and detailed, customisable reports, with a strong emphasis on data visualisation and actionable insights.

Key reporting and metrics requirements include:

- Data Collection and Response Reporting: The platform must facilitate robust data collection and efficient response reporting.
- Report Generation and Management: Capability to generate and manage a variety of reports.
- Data Visualisation: Provision of data visualisation tools, including dashboards, to present collected and real-time data using visuals such as graphs and pie charts.
- Sentiment Reporting: Ability to track, monitor, and highlight negative and positive sentiment from qualitative feedback.
- AI-powered Research Analytics: Automation of statistical analyses (e.g., Conjoint, MaxDiff) and summarisation of qualitative and video feedback for deeper insights.

Dynamic Dashboards:

- Automated reporting and extraction through role-based dashboards with customisable visualisations to support decision-making and stakeholder reporting.
- AI Insights Summarisation: AI-powered summarisation of quantitative trends, themes, and actionable insights in user-friendly formats.
- AI Text Analytics and Insights Prompting: Automated qualitative analysis that summarises key themes, sentiments, and suggested actions from open-text responses.
- Ability to combine multiple dashboards from various studies to identify similar/same questions and find commonalities in the studies.

10. Remediation Workflow

The Customer Insights Platform, particularly in its capacity to identify areas for improvement and address taxpayer concerns, must support a structured remediation workflow. This workflow will facilitate the efficient process of addressing identified issues and ensuring timely resolution and service recovery.

Key aspects of the remediation workflow include:

- Service Recovery Processes: The platform shall support automated triggers for issue resolution, enabling SARS to address taxpayer concerns promptly and effectively.
- Close Loop Tracking: The system must be capable of tracking service recovery based on

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poor service ratings.

- Feedback Loop Mapping: The insights platform should allow for the mapping back of feedback by taxpayers to facilitate service recovery where it is deemed necessary.

- Actionable Insights: The platform's ability to generate real-time, context-specific, and actionable insights will directly support relevant business areas in acting on identified issues. This includes automated qualitative analysis that summarises key themes, sentiments, and suggested actions from open-text responses.

- Targeted Service Improvements: The insights gained from the platform will support more targeted service improvements and inform strategic interventions.

11. Integration with Existing Systems

The platform must support dynamic data exchange to achieve these objectives.

Key integration requirements include:

- Seamless Integration with:
    - SARS data warehouse for analytics and segmentation
    - Filing channels, e.g. eFiling and MobiApp for embedded surveys.
    - CRM and contact centre platforms for service recovery.
- Integration must support secure, bi-directional data flows and adhere to SARS ICT governance.
- Consolidated Taxpayer, trader and employee Engagement View: The platform should enable the integration of feedback data with operational data from SARS systems to provide a unified view of taxpayer engagement across all SARS touchpoints (e.g., eFiling, MobiApp, branch, contact centre), linking feedback received to specific channel engagement to support proactive engagement strategies and service personalization.
- IFrame Solutions: The ability to embed surveys or dashboards directly into SARS digital platforms to enhance user experience and accessibility.

12. Compliance Requirements

The Customer Insights Platform must adhere to legal, regulatory, and internal governance standards to ensure the ethical handling of taxpayer data and alignment with SARS policies.

- Full compliance with the Protection of Personal Information Act (POPIA) and SARS's internal privacy and data protection policies.
- The platform must enable SARS to manage taxpayer opt-ins and opt-outs, ensuring no communications are sent to individuals who have opted out.
- SARS must retain full and exclusive ownership of all data collected, stored, and processed through the platform.

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- The service provider may not retain or use SARS data for any purpose other than fulfilling contractual obligations.
- At contract termination, the service provider must:
    - Provide SARS with all platform data (including metadata and audit trails) in a structured, reusable format.
    - Securely dispose of any remaining data in line with SARS policy, POPIA, and ISO 27001 standards.
    - Issue a certificate of destruction confirming that all SARS data and metadata have been permanently and irretrievably deleted.

13. Security requirements

The Customer Insights Platform must provide the following essential security authentication and access control measures to protect sensitive data and ensure authorized access.

Key security authentication and access control requirements include:

- User Management: The platform must possess strong user management capabilities, allowing for the comprehensive management of user roles and permissions.
- Role-Based Access Control (RBAC): Implementation of secure, role-based access to different features and datasets across the platform. This ensures that users only access information and functionalities relevant to their assigned roles.
- Audit Trails: The system must maintain detailed audit trails of all user activities, including logins, data access, modifications, and administrative actions.
- Encryption: Implementation of robust encryption protocols for sensitive data both in transit and at rest to prevent unauthorized access and protect data confidentiality.
- Governance Controls: The platform must support and enforce SARS's internal governance controls related to user access and data security.

14. Monitoring and Alerts

The Customer Insights Platform must include necessary monitoring and alerting capabilities to ensure continuous operational efficiency, security, and performance.

- The system must monitor survey engagement metrics (e.g. delivery rates, bounce rates, response rates, drop-off points) in real time.
    - Alerts must be configurable to detect and notify of unauthorised access attempts
- The platform must monitor all API and integration points to detect:
    - Broken connections or failed data syncs
    - Delays in event-triggered survey distribution
    - Inconsistencies between feedback data and linked operational data

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15. Testing and Validation

The service provider must support and participate in the following testing phases:

- Data Migration Testing: Ensure historical data and metadata from the legacy platform are migrated completely, accurately, and securely.
- Integration Testing: Verify seamless data exchange between the platform and SARS systems (e.g. data warehouse, digital channels, identity management, APIs).
- Accuracy and Reliability: Validation that the platform accurately identifies insights, performs statistical analyses correctly, and provides reliable data for decision-making.

16. Vendor Requirements

The service provider must provide the following the critical qualifications, capabilities, and support structures.

- The solution should offer fixed annual pricing model that is not usage based. The pricing should not be based on:

  - Number of responses
  - Number of users
  - Data volumes migrated.
  - API integration

- All platform capabilities and bidder offer should be operational at the time of go-live date.
- The Bidder shall be fully responsible for the provision, hosting, and ongoing management of the customer survey platform. The solution must be hosted within the Bidder's environment (or approved cloud infrastructure) and must not require any hosting or infrastructure provisioning by SARS.
- The Bidder is required to ensure that all associated costs are fully incorporated into the proposed pricing model, and that no additional or separate costs will be applicable post contract award.
- The vendor must demonstrate the capability to support a three-year engagement, including:
  - Continuity of technical and strategic support,
  - Platform scalability over time and accommodate the growing volume and complexity of taxpayer data and insights.
  - Ongoing alignment with SARS's evolving requirements across the contract lifecycle
- Demonstrate experience in implementing enterprise-level customer insight or experience platforms for large organisations, preferably in the public sector or finance sector.
- Have proven capability to manage platforms with high-volume feedback traffic, large

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respondent databases, and real-time reporting demands.

- Have a track record of successfully integrating survey and feedback platforms with internal systems (e.g., CRMs, data warehouses, digital channels).
- Ensure provision of comprehensive post-go-live technical support services to resolve technical issues, ensure uptime, and assist with continuous platform optimization.
- Platform must be commercially proven, widely adopted, and actively maintained.
- Platform roadmap must demonstrate continued investment in automation, AI analytics, and regulatory compliance features.
- Data Handling and Disposal: The Service Provider must not retain any SARS data or information they may come across while conducting their work. At the completion of the assignment, the bidder must demonstrate that they have disposed of the data in accordance with the SARS Records Management and Information Disposal - Internal Policies.

17. Underlying Principles towards RFP

Below are fundamental principles guiding the entire Request for Proposal process, emphasizing key non-negotiable standards for security, data handling, and compliance.

- Security vetting and security clearance of all relevant staff prior to commencement of jobs under embargo.
- The Bidder staff assigned to SARS assessments must sign the Oath of Secrecy form and will be expected to familiarise themselves with applicable SARS Internal Policies prior to commencement of work.
- During the assessments, the Analysts may be assigned SARS equipment and access privileges where applicable. Usage of the equipment and access provided is governed by SARS Information Security Policies.
- The Service Provider must not retain any SARS data or information that they may come across while conducting their work.
- Any component of the solution that resides outside of the SARS internal network requires encryption technologies that provides for both encryption-in-transit and encryption-at-rest will full audit trail that complements non-repudiation principles.
- Service Provider Exit Strategy: SARS require the existence of a planned exit (exit strategy) in preparation for an end or termination of the contract with the Service Provider and cloud service provider (CSP). The Service Provider needs to confirm compliance with SARS requirements in this regard.
- SARS retains an immediate and ongoing right of access to all SARS organisational data held by the Service Provider and/or cloud service provider. The Service Provider should confirm access to SARS information during termination of Services and as part of the agreed contract exit plan.
- The Service Provider must guarantee the accuracy, integrity, and reliability of data to ensure the ongoing availability of the data and maintain control over its retention or disposal.

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- SARS require that the Service Provider make provisions for the safe return/transfer of data should the cloud service provider be the subject of a takeover.

- The Service Provider will be required at the termination of the agreement, to make provisions for the secure transfer of SARS data as it relates to the services, at no additional cost to SARS.

- Metadata relating to SARS in relation to the administration of the services must be disposed of by the Service Provider and as authorised by SARS. SARS will require the CSP to provide SARS with a certificate of proof that such data disposal was performed in line with the provisions of ISO 27001 Requirements for Data and Asset Disposal, the provisions of the POPIA, and/or the provisions of the GDPR and/or that of the Service Provider own disposal policy, whichever process is most rigorous and acceptable to SARS.

The bidder must at completion of the assignment show that they have disposed of the data in accordance with the SARS Records Management and Information Disposal - Internal Policies.

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