**ANNEXURE A2**

**TECHNICAL COMPLIANCE CHECKLIST**

**Please refer to Section 10.5 to complete this form. The form must be submitted in File 1, Exhibits 2 & 3**

**Example on how to complete the compliance checklist:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Section**  **No** | **Technical Criteria** | **Compliant** | **Partially Compliant** | **Non-Compliant** | **Reference page in Proposal** | **Comments** |
| 16.1 | A company profile detailing structure, service offering and infrastructure to render the services | Yes  **EXAMPLE** |  |  | Page 9 - exhibit 2 |  |
|  | Bidder(s) demonstrated how transfer of relevant knowledge and skills will be implemented to SARS personnel on advisory and related projects |  | Yes |  | Page 10 - exhibit 2 | Bidder to state reason for partial compliance |
|  | Demonstrated expertise in each category of interest and area(s) of specialisation. |  |  | No | Page 11 - exhibit 2 | Bidder to state reason for non-compliance |

**Please refer to Section 10.5 to complete this form. The form must be submitted**

| **Section**  **No. 10.3** | **Technical Criteria** | **Compliant** | **Partially Compliant** | **Non-Compliant** | **Reference page in Proposal** | **Comments** |
| --- | --- | --- | --- | --- | --- | --- |
| **10.3.1** | **Company Profile** |  |  |  |  |  |
| 10.3.1.1 | Bidder should provide in their response, the following but not be limited to:  * A company profile detailing structure, service offering and infrastructure to render the services; * Full contact details of the key contact person/Account Manager |  |  |  |  |  |
| 10.3.1.2 | Provide information on the availability of the following:  * Infrastructure (geographical footprint, staff compliment and office location); * Computer(s), email- and internet access; * Information security safeguards (i.e. anti-virus software, firewalls etc.); * Back-up and disaster recovery plans; * Telephone and fax facilities; * Printing- and photocopying facilities; and * Library / research facilities. |  |  |  |  |  |
| **10.3.2** | **Capabilities** |  |  |  |  |  |
| 10.3.2.1 | A schedule (Annexure D) of the bidder’s experience and proven track record over the past five (5) years, in respect of advisory services. Information provided must be related to the category the bidder is tendering for in line with section 10 of this document.The schedule must include for each client the following information:  * Client Name; * Contact person, phone number, business address; * Contract period; * Description of the project; * Challenges; and * Lessons learned. |  |  |  |  |  |
| 10.3.2.2 | A one page CV of all Key Personnel per category the bidder is tendering for. The information provided must include:   * Name and surname * Relevant qualification(s) * Relevant experience * Relevant certification(s) and accreditation(s) with professional bodies. |  |  |  |  |  |
| **10.3.3** | **Skills Transfer** |  |  |  |  |  |
|  | Bidder(s) are required to demonstrate how transfer of relevant knowledge and skills will be implemented to SARS personnel on advisory and related projects. |  |  |  |  |  |
| **10.3.4** | **Client References** |  |  |  |  |  |
|  | Bidder should provide two (2) contactable testimonial letters from current / recent clients (not older than 5 years) for each category that the bidder has tendered for to whom similar services are being/have been provided. The testimonial letters must be on a company letterhead and include the following: company name, contact name, address, phone number, and duration of contract, a brief description of the services rendered and the level of customer satisfaction. |  |  |  |  |  |

Our bid submission is in compliance with the completed tender check list above.

Yours sincerely

**…...............................................................**

**NAME OF COMPANY : .................................................................…........................................**

**NAME OF SIGNATORY : ........................................…................................................................**

**DESIGNATION OF SIGNATORY : ......................................…................................................................**

**DATE : ......................................…................................................................**

**TELEPHONE : …………………….…....................................................................**

**E-mail : ………………………....................................................................**