

REFERENCE: RFP 64/2018

MAIN RFP DOCUMENT

**TURNKEY SOLUTION FOR SARS
CONTACT CENTRE IN BELLVILLE,
WESTERN CAPE**

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Summary, Guidelines, Conditions and Instructions

1 STRUCTURE OF THE RFP PACK

The South African Revenue Service (“SARS”) invites certain qualified persons (“Bidders”) to submit tenders and proposals (“Tenders”) in accordance with the rules set out in this RFP for the turnkey solution for SARS Contact Centre in Bellville, Western Cape for a duration of ten (10) years.

Bidders to note the following:

- In the event of Real Estate Agent acting on behalf of the landlord for the purposes of this tender, then the agent will be required to submit a formal real estate agency agreement between the agent and the Landlord. The agent will be presumed to hold a sole mandate to act on behalf of the landlord.
- Bidders are required to sub-contract a minimum of 25% of the contract or project to An EME or QSE which is at least 51% owned by black people. SARS understands that it may not be feasible to subcontract a lease, however other functions of the turnkey solution can be subcontracted, including the ergonomic fit out.
- At this tender the bidder is excepted to price for rental, operating costs and parking. Should the bidder be successful, the ergonomic fit out and pricing of the the ergonomic fit out process will commence. The bidder’s professional team will initiate Stage 1 of the Stage 1 to 6 processes inclusive of fit out and construction.
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1.1 Structure

This RFP Pack is organised in 5 (five) sections consisting of one or more documents in each section.

Section	Description of section contents
1	Documents outlining the RFP background, conditions, instructions and documents necessary for the Bidder to register for the Bidders briefing session.
2	Standard Bid Documents (SBDs). These documents are required by SARS Procurement and National Treasury to be read, signed and to be returned as part of the Bidder’s Tender response.
3	Documents outlining the business requirements, technical requirements and other information required by the Bidder to submit a Tender response.

4	Response templates. Templates that are required to form part of the Bidder's Tender response.
5	Draft lease and GCC attached

2 KEY DATES AND ACTIVITIES

This RFP bidding process is valid for a period of one hundred and eighty (180) business days from the closing date. Consequently, bidders undertake to submit quantitated prices that are valid for a period of one hundred and eighty (180) business days from the closing date.

The table below lists certain key dates and activities relevant from time of issuance of the RFP up to and until the Closing Date:

No	Description	Date/Time
1.	Advertisement of the Bid in the government tender bulletin, National Treasury and SARS website.	26 October 2018
2.	Bidders to submit written questions	29 October – 16 November 2018
3.	SARS to respond to written questions posed by bidders	19 November 2018
4.	Tenders due (" Closing Date and time ")	27 November 2018 @ 11:00

All dates and times in this RFP are South African Standard Time.

Any time or date in this RFP is subject to change at SARS's discretion. The establishment of a time or date in this RFP does not create an obligation on the part of SARS to take any action, or create any right in any way for any Bidder to demand that any action be taken on the date established, or on any other date. The Bidder accepts that; if SARS extends the deadline for RFP submission for any reason, the requirements of this RFP otherwise apply equally to the extended deadline.

3 SARS' REQUIREMENTS

3.1 Introduction

SARS's mandate under the South African Revenue Service Act No. 34 of 1997 includes the collection of all revenues that are due, ensuring maximum compliance with revenue legislation and providing a customs service that will maximise revenue collection, facilitate

trade and protect the borders of South Africa. SARS's vision is to be an innovative revenue and customs agency that enhances economic growth and social development and supports South Africa's integration into the global economy in a way that benefits all citizens. SARS strives to exercise its mandate in an efficient and cost effective manner.

3.2 Overview of SARS Requirements

The objective of this bid is for the provision of a turnkey solution for SARS Contact Centre in Bellville, Western Cape for a duration of ten (10) years. Attached is the detailed specification.

4 SARS' APPROACH TO THIS RFP

4.1 Objectives

SARS's primary objective in issuing this RFP is to conclude an agreement with successful Bidder that will achieve the following:

- 4.1.1 best value for money;
- 4.1.2 the sustainable supply of Services; and
- 4.1.3 the meeting of SARS's current requirements (at a minimum) and providing for flexibility to meet SARS's future needs related to the scope.

5 BIDDING QUALIFICATION

5.1 Introduction

SARS has a detailed evaluation methodology premised on Treasury Regulation 16A3 of the Public Finance Management Act 1 of 1999, which prescribes that SARS's procurement processes must be:

- 5.1.1 economical, efficient, fair, equitable, transparent, competitive and cost effective;
- 5.1.2 consistent with the Preferential Procurement Policy Framework Act 5 of 2000, read together with the Preferential Procurement Regulations, 2017; and
- 5.1.3 consistent with the Broad-Based Black Economic Empowerment Act 53 of 2003.

In furtherance of this evaluation methodology, the following bidding qualifications as set out in paragraph 6.3 will apply.

5.2 Central Supplier Database (“CSD”)

- 5.2.1 In terms of the National Treasury Instruction No. 4A of 2016/2017 regarding the National Central Supplier Database (CSD), all bidders must register on the CSD.
- 5.2.2 National Treasury will maintain the database for all suppliers for Government and its institutions.
- 5.2.3 All existing and prospective suppliers are requested to register on the CSD by accessing the National Treasury website at www.CSD.gov.za.
- 5.2.4 As part of the bid submission, bidders are required to submit their CSD number with their tender submission.

5.3 Bidding Qualification

- 5.3.1 Prospective Bidders who cannot, or do not, satisfy all of the conditions contained in paragraphs 5.3.1.1 to 5.3.1.4 should not submit bid proposals. If a Bidder is found not to meet any one of the requirements listed in paragraphs 5.3.1.1 to 5.3.1.4, then that Bidder's Tender will be rejected without any further consideration, at SARS's sole discretion.
 - 5.3.1.1 SARS is only interested in organisations that take accountability for service delivery. To avoid issues encountered where a single entity cannot provide the warranties of performance required or be held accountable for performance.
 - 5.3.1.2 A Bidder must be a South African entity (Company, Close Corporation, Sole Proprietor or individual) or have a local branch office in South Africa.
 - 5.3.1.3 The bidder must be fully tax compliant to be considered for this RFP. The Bidder's attention is further drawn to the requirement that the successful Bidder must ensure that it remains compliant with all South African Tax and Customs laws and regulations throughout the term of the agreement, and failure to do so will be a material breach of the Agreement.
 - 5.3.1.4 The Bidder must comply with all applicable legislation in the Republic of South Africa in the performance of its daily activities, including but not limited to labour legislation and bargaining council agreements, health and safety regulations and environmental laws.
- 5.3.2 Subject to sub-paragraph 5.3.3 below, SARS will disqualify any Bidder who either itself or any of whose members (save for such members who hold a minority interest in the Bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the Bidder other than in the context of shares listed on a recognised stock exchange), directors or members of senior management, whether in respect of SARS or any other government organ or entity and

whether from the Republic of South Africa or otherwise ("Government Entity"):

- 5.3.2.1 engages in any collusive tendering, anti-competitive conduct, or any other similar conduct, including but not limited to any collusion with any other Bidder in respect of the subject matter of this RFP;
- 5.3.2.2 seeks any assistance, other than assistance officially provided by a Government Entity, from any employee, advisor or other representative of a Government Entity in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- 5.3.2.3 makes or offers any gift, gratuity, anything of value or other inducement, whether lawful or unlawful, to any of SARS's officers, directors, employees, advisors or other representatives;
- 5.3.2.4 makes or offers any gift, gratuity, anything of any value or other inducement, to any Government Entity's officers, directors, employees, advisors or other representatives in order to obtain any unlawful advantage in relation to procurement or services provided or to be provided to a Government Entity;
- 5.3.2.5 accepts anything of value or an inducement that would or may provide financial gain, advantage or benefit in relation to procurement or services provided or to be provided to a Government Entity;
- 5.3.2.6 pays or agrees to pay to any person any fee, commission, percentage, brokerage fee, gift or any other consideration, that is contingent upon or results from, the award of any tender, contract, right or entitlement which is in any way related to procurement or the rendering of any services to a Government Entity;
- 5.3.2.7 has in the past engaged in any matter referred to in sub-paragraphs 5.3.2.1 - 5.3.2.6 foregoing; or
- 5.3.2.8 has been found guilty in a court of law on charges of fraud and/or forgery, regardless of whether or not a prison term was imposed and despite such Bidder, member or director's name not specifically appearing on the List of Tender Defaulters kept at National Treasury.
- 5.3.3 SARS in its sole discretion will be entitled (but not obliged) to exempt, in writing, a Bidder from disqualification in terms of sub-paragraph 5.3.2.7 foregoing. A Bidder that stands to be disqualified in term of sub-paragraph 5.3.2.7 foregoing may, prior to submitting a Tender, approach SARS in writing for an exemption as foresaid, in which event:
 - 5.3.3.1 the Bidder is required to provide SARS with full information to enable SARS to consider such application for exemption; and

- 5.3.3.2 SARS will not be obliged to consider any such application or to grant any exemption, such consideration or granting of exemption being solely within SARS's discretion.
- 5.3.4 By submitting a Tender the Bidder represents to SARS that it does not stand to be disqualified in terms of paragraph 5.3.1 foregoing, unless it has otherwise applied for exemption or been exempted in terms of paragraph 5.3.3 foregoing.
- 5.3.5 SARS will reject a Bidder's Tender without any further consideration where that Bidder makes culpable misrepresentation to SARS in its Tender or at any stage during this RFP process.
- 5.3.6 SARS may disqualify a Bidder:
- 5.3.6.1 whose Tender contains a misrepresentation which is materially incorrect or misleading;
 - 5.3.6.2 in respect of whom any of the members (save for such members who hold a minority interest in the Bidder through shares listed on any recognised stock exchange), indirect members (being any person or entity who indirectly holds at least a 15% interest in the Bidder other than through shares listed on a recognised stock exchange), directors or members of senior management are not in full compliance with all applicable laws relating to taxation in South Africa, in which regard SARS further reserves the right to require the Bidder to submit a valid tax clearance certificate in respect of any one or more such persons;
 - 5.3.6.3 whom SARS considers to be directly or indirectly owned, controlled or managed by persons who are not acceptable to SARS from an ethical, business or governance perspective;
 - 5.3.6.4 who fails to attend for the full duration of a Bidders' briefing session.
 - 5.3.6.5 who had access to any of SARS's proprietary information or any other matter that may have unfairly placed that Bidder in a preferential position in relation to any of the other Bidders;
 - 5.3.6.6 who materially fails to comply with any conditions or requirements of this RFP;
 - 5.3.6.7 who in SARS's opinion has either materially failed to comply with any of the conditions of any existing or past agreement between such Bidder and SARS or who has performed unsatisfactorily under any such agreement; or
 - 5.3.6.8 who fails to respond as required to written notices given by SARS in connection with its Tender under this RFP.
 - 5.3.6.9 Where there is conflict between the Specification and/or any documentation published

along with this document. The Provisions of this document take precedence overall.

6 BID SUBMISSION

- 6.1.1 Bids must be properly received and deposited in the below mentioned tender box on or before the closing date and before the closing time at the Tender Submission Office situated at:

SARS Procurement Centre

Brooklyn Bridge

Linton House - Ground Floor

570 Fehrsen Street

Brooklyn, Pretoria

- 6.1.2 Bid documents may either be posted to The Tender Office - SARS Procurement Department, Linton House, 570 Fehrsen Street, Brooklyn Bridge, Brooklyn, Pretoria, 0181 OR placed in the tender box at the main entrance at the aforesaid address
- 6.1.3 Tender documents will only be considered if received by the Tender Office before the Closing Date and time, regardless of the method used to send or deliver such documents to SARS.
- 6.1.4 Late tenders will not be accepted.
- 6.1.5 In this RFP document the terms “shall” and “must” indicate a mandatory requirement. Bidder compliance with mandatory requirements is essential. Failure to comply with such requirements can lead to the disqualification of a Bidder. The terms “should” or “may” indicate desirable or advisory requirements. Bidder compliance with such terms may lead to an increase in a Bidder’s technical score.
- 6.1.6 All tenders and supporting documentation must be submitted in English.
- 6.1.7 All costs incurred during the preparation and compilation of a Bidder’s proposal, as well as the delivery of a Bidder’s tender documents to SARS will be borne exclusively by the Bidder.
- 6.1.8 Tender must be valid for a minimum period of 180 days from the closing date of the tender.

6.2 TENDER COMPLIANCE

- 6.2.1 The Bidder’s attention is drawn to the following documents which are required as part of a Bidder’s Tender and which, if omitted, may at SARS’s sole discretion result in that Tender

being disqualified:

TABLE 1 – SUPPORTING DOCUMENTS

No.	Name of the document that must be submitted	Non-submission may result in disqualification?
1	Invitation to bid form – SBD 1	YES – Please complete and sign the supplied pro forma document.
1	Pricing Schedule – SBD 3.1	YES – Please submit full details of pricing proposal to SARS on Annexure 3.
2	Declaration of Interest – SBD 4	YES - Please complete and sign the supplied pro forma document.
3	Preference Point Claim Form - SBD 6.1	No–Non-submission will lead to a zero score on BEE.
4	Declaration of Bidder's Past Supply Chain Management Practices – SBD 8	YES - Please complete and sign the supplied pro forma document.
5	Certificate of Independent Bid Determination – SBD 9	YES - Please complete and sign the supplied pro forma document
6	BEE certificate OR Sworn Affidavit (whichever applicable according to SBD 6.1)	YES - Must accompany bid submission
7	SARS' s Oath of Secrecy	YES – Please complete and sign the supplied pro forma document in the presence of Commissioner of Oaths and initial every page.
8	Supplier Cost and Risk Assessment Questionnaire	YES - Please complete and sign the supplied pro forma document.
9	CSD report	YES - Must accompany bid submission
10	SARS General Conditions of Contract	YES - Must accompany bid submission
12	<p>A complete set of audited/reviewed annual financial statements for three (3) most recent financial periods in the name of the bidding entity.</p> <p>The annual financial statements must contain:</p> <ul style="list-style-type: none"> • Statement of Profit and Loss and other Comprehensive Income • Statement of Financial Position 	YES - Please submit

	<ul style="list-style-type: none"> • Statement of Cash Flows • Accompanying Notes <p>Entities which are trading for less than 3 (three) financial periods should provide:</p> <ul style="list-style-type: none"> • A letter detailing the fact, signed by a duly authorised representative of the entity; and • Any other information or documentation which would provide more clarity on the financial history of the bidder. <p>In the event that the subsidiary is the bidding entity and submits the financial statements of the holding company for financial evaluation purposes, the holding company must furnish a Performance Guarantee that is signed by a duly authorised representative of the entity.</p> <p>In the event of the bid being in the form of a Joint Venture (JV), the following is required:</p> <ul style="list-style-type: none"> • Annual financial statements of the JV; and • JV legal agreement detailing the percentage ownership of each entity. • Unincorporated JV's should submit separate financial statements for each party in the JV and a signed JV legal agreement. <p>NB: SARS retains the right to request further information with regards to the annual financial statements, should the need arise.</p>	
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TABLE 2 – MANDATORY REQUIREMENTS

6.2.2 The table below contains the pre-technical (mandatory pre-qualification) criteria that are specific to this RFP. If the bidder does not meet any of the mandatory pre-qualification

criteria, the bidder will be disqualified and the bidder's proposal will not be evaluated further. The bidder should be aware that any other requirement that is indicated as a mandatory requirement in this or any other document in this RFP pack may also serve as a pre-qualification requirement unless stated otherwise.

BIDDERS ARE EXPECTED TO COMPLETE ANNEXURE 1 AND 2 PROVIDED FOR THE MANDATORY REQUIREMENTS

	Requirement	Description	Non-submission may result in disqualification?
1	Information / confirmation on the Suitability for SARS Operations	Provide the physical address of the proposed building and include pictures of proposed building. Building location is within tendered specs. See Section 2.2 of the technical specification document. Bidder to submit a full schedule on building information and physical address.	Yes
2		Parking adhering to the requirements of Annexure C of the technical specification document is met in full. Bidder to enter the number of On-site parking bays, Off-site parking bays (if any), and Total Bays provided	Yes
3	Include drawings (Attach the drawings in AutoCAD compatible format).	Full AutoCAD 2015 version (or compatible DWG file format) CAD drawings (printed and electronic) of the proposed premise suitable for full architectural workup. The bidder must supply accurate and up-to-date site plan, floor plans, elevations and primary sections. Landlord's Architect to place contact centre layout (Conceptual) on CAD drawings before submitting. See Annexure A for design concepts and Annexure B for business requirements of the technical specification document for this tender.	Yes
4	Building Shell	Suspended Ceiling heights of min 2700mm	Yes

		<p>clear AFFL. If ceiling heights are below 2700, bidder is to indicate that this can be rectified to minimum 2700mm during retrofit while still allowing for full coordinated ceiling services.</p> <p>Bidder to enter the Current and Future clear height in mm.</p>	
5	Split Floor (if applicable)	<p>As per Section 1 Building Characteristics of the technical specification document, if a split floor proposal is offered, it will comply with ground and first floor – or – first floor and second floor and sizes per floor as specified.</p> <p>Landlord's Architect to indicate areas per floor indicating 50% split per floor (within 10% allowance either way).</p>	Yes
6	Proposed Program.	<p>Provision of a detailed proposed program of the beneficial occupation not exceeding 12 months must be submitted.</p> <p>Points will be scored in Section 7.3 below, however a mandatory stipulation of not exceeding 12 months is included in this tender.</p>	Yes
	B-BBEE	<p>Bidders are required to sub-contract a minimum of 25% of the contract or project to:</p> <p>An EME or QSE which is at least 51% owned by black people</p> <p>Bidder to complete Annexure 1 for declaration of subcontracting</p>	Yes

NB:FAILURE TO COMPLY WITH ALL OF THE ABOVE MANDATORY REQUIREMENTS WILL RESULTS IN IMMEDIATE DISQUALIFICATION.

7 EVALUATION AND SELECTION

7.1 Process after Closing Date

After the Closing Date in paragraph 2 (Key Dates)

- 7.1.1 SARS may request additional information, clarification or verification in respect of any information contained in or omitted from a Bidder's Tender, which SARS may do either in writing or at a meeting convened with the Bidder for that purpose;
- 7.1.2 SARS may conduct a due diligence on any Bidder, which may include interviewing customer references or performing other activities to verify a Bidder's submitted or other information and capabilities (including visiting the Bidder's various premises and/or production sites to verify certain stated facts or assumptions) and in which regard the Bidder will be obliged to provide SARS with all such access, assistance and/or information as SARS may reasonably request. The Bidder shall respond within the timeframes set by SARS, failing which SARS reserves the right not to consider the Bidder's Tender any further;
- 7.1.3 no material amendment/s may be made to a Tender, unless specifically permitted or requested by SARS;
- 7.1.4 SARS may shortlist Bidders and may request presentations from such short-listed Bidders. All costs relating to the preparation of such presentations will be borne by the Bidders;
- 7.1.5 SARS may enforce whatever measures it considers necessary to ensure the confidentiality and integrity of the contents of the respective Tenders;
- 7.1.6 SARS will evaluate the Tenders with reference to SARS's Evaluation Criteria. SARS reserves the right to employ subject matter experts to assist in performing such evaluations.

7.2 SARS's Pre-qualification Criteria – Gate 0

- 7.2.1 SARS has defined minimum pre-qualification criteria that must be met by the Bidder in order for SARS to accept a Tender for evaluation. In this regard a pre-evaluation verification will be carried out by SARS in order to determine whether a Tender complies with the provisions of paragraphs 6.2 and 7.2
- 7.2.2 Where there is a failure to comply fully with any of the pre-qualification criteria, or SARS is for any reason unable to verify whether the pre-qualification criteria are fully complied with, SARS will have the right to either:

7.2.2.1 reject the Tender in question and not to evaluate it at all;

7.2.2.2 give the Bidder an opportunity to supplement the information and/or documentation provided by it under its Tender so as to achieve full compliance with the pre-qualification criteria, provided that such information and/or documentation can be provided within a period of 7 (seven) days and is purely administrative in nature;

7.2.2.3 in any event permit the Tender to be evaluated, subject to the outstanding information and/or documentation being submitted prior to the award of the tender.

7.3 SARS's Technical Evaluation Criteria – Gate 1

Two Stages: Stage 1- Desktop Analysis and Stage 2- Site Analysis

7.3.1 Only bidders that have met the mandatory requirements will be evaluated in gate 1 on technical functionality. In the technical evaluation phase, bidders will need to attain a minimum of 70 out of 100 points.

Criteria – TECHNICAL- DESKTOP EVALUATION	Weighting
Desktop analysis of Location. <ul style="list-style-type: none"> Building location within tender specs – Section 2.2 of the technical specification document (Yellow) (5). Building location within extended margin specs – Section 2.2 of the technical specification document (Blue) (3). Building location outside this area – (mandatory criteria) disqualification. 	5
Desktop analysis of parking. <ul style="list-style-type: none"> All parking is available on site (5). All parking available but some outsourced to 3rd party service provider (3). All parking is off site via outsourced 3rd party service provider (1). 	5
Location (level) in proposed bidder's building: <ul style="list-style-type: none"> Ground floor only presence (5). Split (Ground and First) (3). Split (First and Second) (1). 	5
Proposed Program <ul style="list-style-type: none"> Beneficial Occupation within 9 months or less (15). Beneficial Occupation within 10-11 months (10). Beneficial Occupation within 12 months (5). Beneficial Occupation longer than 12 months (0). 	15
Desktop (AutoCAD) analysis of Contact Centre Layout. <ul style="list-style-type: none"> Proposed building allows for optimal placement of SARS contact centre 	40

<p>model (40).</p> <ul style="list-style-type: none"> Proposed building allows for good placement of SARS contact centre model with some elements not ideal but acceptable (30). Proposed building allows for average placement of SARS contact centre model with significant elements not ideal and marginally acceptable (20). Proposed building does not allow for a SARS specific contact centre design to be efficiently implemented (0). 	
<p>Size</p> <ul style="list-style-type: none"> Usable m2 within 4% of specification of 2765 m2 either way (10). Usable m2 over 4% but within 10% of specification of 2765 m2 either way (5). Usable m2 greater than 10% of specification of 2765 m2 either way (0). 	10
Total	80

The following criteria will be evaluated during physical evaluation:

Criteria – TECHNICAL - ONSITE EVALUATION	Weighting
<p>Location and proximity to other Commercial institutions:</p> <ul style="list-style-type: none"> Close (within 500m) to takeaway restaurants (1) Close (within 500m) to a mall/ strip mall (1) 	2
<p>Building Location:</p> <ul style="list-style-type: none"> Located close to major vehicle access routes (2) 	2
<p>As built Landlord Building Design basics – general design of the building shell and make up complimentary to SARS Contact Centre requirements (Not internal space planning).</p> <ul style="list-style-type: none"> Building is Grade A+ (4), B+ (2), C+ (1) or will be overhauled by bidder to equivalent – points supplied as equivalent. Building shell is conducive to dedicated SARS entrance or well managed common entrance not obstructed by other tenants (3). 	7
<p>Security aspects of the building, surrounding areas and end state proposal.</p> <ul style="list-style-type: none"> Rentable area is well secured providing a reasonable level of staff security (1). Premises are well secured providing a high level of security to overall property (1). The surrounding areas of the premise do not present obvious concern (1). 	3
<p>Security of and accessibility to parking. (Yes or No)</p> <ul style="list-style-type: none"> Parking is secure. In event of 3rd party option, permanent security must be in place (3). 	3
Proximity to public transport options.	

<ul style="list-style-type: none"> 3 transport types within the tender specifications (3). 2 transport types within the tender specifications (2). 1 transport type within the tender specifications (1). 	3
Total	20

7.4 SARS's Pricing and B-BBEE Evaluation – Gate 2

7.4.1 In the second stage of the evaluation, Tenders that have met the threshold on technical evaluation will be evaluated in terms of the 90/10 preference points system under section 2 of the Preferential Procurement Policy Framework Act, 2000, read with the Preferential Procurement Regulations, 2017

Criterion	Points
BBBEE status	10
Price	90

7.4.1.1 Stage 1 – Price Evaluation (90 points).

Adjudication Criteria	Points
Price Evaluation $P_s = 80 \left(1 - \frac{P_t - P_{\min}}{P_{\min}} \right)$	90

Where

P_s	=	Points scored for price of bid under consideration
P_t	=	Rand value of bid under consideration
P_{\min}	=	Rand value of lowest acceptable bid

NOTE: “In completion of the BOQ, bidders should note that where on a specific line item a cost has been included in a previous line item that the bidder should indicate so on that line item.”

“Failure to complete the BOQ in full may result in automatic disqualification from the tender process”

7.4.1.2 Stage 2 – BEE Evaluation (10 points)

The checklist below indicates the B-BBEE documents that must be submitted for this Bid, failure to submit will result in scoring zero for B-BBEE.

Adjudication Criteria	Points
A duly completed Preference Point Claim Form: Standard Bidding Document (SBD 6.1) and a B-BBEE Certificate	10

CLASSIFICATION	Codes	SUBMISSION REQUIREMENT
Exempted Micro Enterprise (EME)	Below R10 million p.a.	A Sworn affidavit (Preferably a Department of Trade and Industry (DTI) Affidavit) ,Certificate from Companies and Intellectual Property Commission (CIPC) or a B-BBEE Rating Certificate from a SANAS Accredited Rating Agency
Qualifying Small Enterprise (QSE)	Between R10 million and R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited Rating Agency. A Sworn Affidavit (Preferably a Department of Trade and Industry (DTI) Affidavit)– This is only applicable to QSEs with 51% Black Ownership and above.
Large Entity (LE)	Above R50 million p.a.	Certified copy of B-BBEE Rating Certificate from a SANAS Accredited Rating Agency.

Failure on the part of a bidder to submit a B-BBEE Verification Certificate from a Verification Agency accredited by the South African Accreditation System (SANAS), or a Certificate from Companies and Intellectual Property Commission (CIPC) or a B-BBEE Rating Certificate from a SANAS Accredited Rating Agency or a sworn affidavit confirming annual turnover and level of black ownership in case of an EME and QSE together with the bid, will be interpreted to mean that preference points for B-BBEE status level of contribution are not claimed.

Bidders who do not claim preference points will be scored zero for BEE but cannot be excluded from the tender process.

Use and acceptance of Affidavits

SARS reserves the right to request that bidders submit their Black ownership and turnover information in support of their Affidavits.

Joint Ventures and Consortiums

A trust, consortium or joint venture, will qualify for points for their B-BBEE status level as a legal entity, provided that the entity submits their B-BBEE status level certificate.

A consortium or joint venture will qualify for points for their B-BBEE status level as an unincorporated entity, provided that the entity submits their consolidated B-BBEE scorecard as if they were a group structure and that such a consolidated B-BBEE scorecard is prepared for every separate bid.

Tertiary Institutions and Public Entities

Tertiary Institutions and Public Entities will be required to submit their B-BBEE status level certificates in terms of the specialized scorecard contained in the B-BBEE Codes of Good Practice.

Proof of Existence: Joint Ventures and/or Sub-Contracting

Bidders must submit concrete proof of the existence of joint ventures and/or sub-contracting arrangements. SARS will accept signed agreements as acceptable proof of the existence of a joint venture and/or sub-contracting arrangement.

The joint venture and/or sub-contracting agreements must clearly set out the roles and responsibilities of the Lead Partner and the joint venture and/or sub-contracting party. The agreement must also clearly identify the Lead Partner, who shall be given the power of attorney to bind the other party/parties in respect of matters pertaining to the joint venture and/or sub-contracting arrangement.

7.5 Acceptance of RFP conditions

The Bidder's participation in the RFP process is deemed to constitute acknowledgement and acceptance by the Bidder of the terms and conditions contained in this RFP.

7.6 Reservation of rights

SARS reserves the right in its discretion to:

7.6.1 make no award;

7.6.2 withdraw, suspend or cancel this RFP or the RFP process at any time and without providing

reasons;

- 7.6.3 not provide reasons for its rejection or the failure of any Bidder or Tender, save on application and in terms of applicable legislation;
- 7.6.4 change any of its requirements as set out in this RFP by giving Bidders reasonable notice;
- 7.6.5 change any condition, procedure or rule of the RFP by giving Bidders reasonable notice;
- 7.6.6 amend, vary, or supplement any of the information, terms or requirements contained in this RFP, any information or requirements delivered pursuant to this RFP, or the structure of the RFP process;
- 7.6.7 re-advertise for Tenders;
- 7.6.8 provide further information in respect of, and modify the provisions of, this RFP at any time prior to the Closing Date by notice to all prospective Bidders;
- 7.6.9 conduct site visits and/or perform audits whenever SARS deems it prudent to do so;
- 7.6.10 undertake further checks on Bidders, which may include information on public record or in the public domain, information contained in internal SARS records or information received from other government institutions;
- 7.6.11 no longer consider a Bidder's Tender where adverse information about the Bidder or its Tender submission has come to the attention of SARS, provided that such Bidder is informed accordingly and invited to comment;
- 7.6.12 to award a Tender based on which Bidder is offering the best value for money, even if such Tender is not the lowest priced tender; and
- 7.6.13 to make the award subject to the successful Bidder entering into a duly signed contract with SARS.

7.7 Validity of information

SARS has made reasonable efforts to ensure the accuracy of the information contained in this RFP. However, neither SARS, nor its employees, officers, advisers or agents will be liable to the Bidder or any third party for any inaccuracy, the omission of any information in the RFP or in respect of any additional information SARS may provide to the Bidder as part of the RFP process.

The Bidder is deemed to have examined this RFP and any other information supplied by SARS to the Bidder and to have satisfied itself before submitting any of its responses as to the correctness and sufficiency of such information.

7.8 RFP not an offer

This RFP does not constitute an offer to do business with SARS, but merely serves as an invitation to Bidders to facilitate a requirements-based decision process.

Nothing in this RFP or any other communication made between SARS (including its officers, directors, employees, advisers and representatives) is a representation that SARS will offer, award or enter into a contract with the Bidder.

7.9 Preparation Costs

The Bidder will bear all its costs in preparing, submitting and presenting any response or Tender to this RFP and all other costs incurred by it throughout the RFP process. Furthermore, no statement in this RFP will be construed as placing SARS, its employees or agents under any obligation whatsoever, including in respect of costs, expenses or losses incurred by the Bidders in the preparation of their response to this RFP.

7.10 Conflict of Interest

If at any time the Bidder identifies an actual or potential conflict of interest, the bidder must immediately notify SARS in writing. SARS reserves the right to exclude the Tender submitted by such Bidder from further consideration, unless the Bidder is able to resolve the conflict. In addition, if it comes to SARS's knowledge that there was indeed a conflict of interest or a potential conflict of interest, same will be grounds for the immediate disqualification of the bidder

7.11 Indemnity

If a Bidder breaches the conditions of this RFP and, as a result of that breach, SARS incurs costs or damages (including, without limitation, the cost of any investigations, procedural impairment, repetition of all or part of the RFP process and/or enforcement of intellectual property rights or confidentiality obligations), then the Bidder indemnifies and holds SARS harmless from any and all such costs which SARS may incur and for any damages or losses SARS may suffer.

7.12 Precedence

This document will prevail over any information provided during any briefing session whether oral or written, unless such written information provided, expressly amends this document by reference.

7.13 Responsibility for sub-contractors and Bidder's personnel

A Bidder is responsible for ensuring that its sub-contractors (if any), personnel (including officers, directors, employees, advisors and other representatives of a Bidder) and personnel of its sub-contractors comply with all terms and conditions of this RFP and in particular the provisions of paragraph 7.4.1.2 above.

In the event that SARS allows a Bidder to make use of sub-contractors, such sub-contractors will at all times remain the responsibility of the Bidder and SARS will not under any circumstances be liable for any losses or damages incurred by such sub-contractors.

7.14 Confidentiality

Except as may be required by operation of law, by a court or by a regulatory authority having appropriate jurisdiction, no information contained in or relating to this RFP or a Bidder's Tender(s) will be disclosed by any Bidder or other person not officially involved with SARS's examination and evaluation of a Tender.

No part of the RFP may be distributed, reproduced, stored or transmitted, in any form or by any means, electronic, photocopying, recording or otherwise, in whole or in part except for the purpose of preparing a Tender. This RFP and any other documents supplied by SARS remain proprietary to SARS and must be promptly returned to SARS upon request together with all copies, electronic versions, excerpts or summaries thereof or work derived therefrom.

Throughout this RFP process and thereafter, Bidders must secure SARS's written approval prior to the release of any information that pertains to (i) the potential work or activities to which this RFP relates; or (ii) the process which follows this RFP. Failure to adhere to this requirement may result in disqualification from the RFP process and civil action.

After the Closing Date, no confidential information relating to the process of evaluating or adjudicating Tenders or appointing a Bidder will be disclosed to a Bidder or any other person not officially involved with such process.

7.15 Intellectual Property

SARS retains ownership of all Intellectual Property Rights in the tender information documents that form part of this RFP. Bidders will retain the Intellectual Property Rights in their tender responses, but grant SARS the right to make copies of, alter, modify or adapt

their responses, or to do anything which in its sole discretion is necessary to do for reasons relating to the RFP process.

7.16 Limitation of Liability

A Bidder participates in this RFP process entirely at its own risk and cost. SARS shall not be liable to compensate a Bidder on any grounds whatsoever for any costs incurred or any damages suffered as a result of the Bidder's participation in this RFP process.

7.17 Tax Compliance

No tender shall be awarded to a Bidder who is not tax compliant. SARS reserves the right to withdraw an award made, or cancel a contract concluded with a successful Bidder in the event that it is established that such Bidder was in fact not tax compliant at the time of the award. SARS further reserves the right to cancel a contract with a successful Bidder in the event that such Bidder does not remain tax compliant for the full term of the contract.

No tender shall be awarded to a Bidder (or any of its members, directors, partners or trustees) whose names appear on the Register of Tender Defaulters kept by National Treasury, or who have been placed on National Treasury's List of Restricted Suppliers. SARS reserves the right to withdraw an award, or cancel a contract concluded with a Bidder should it be established, at any time, that a Bidder has been blacklisted with National Treasury by another government institution.

7.18 Screening and Vetting of Service Provider

Acceptance of this tender/quotation is subject to the condition that both the contracting firm and its personnel providing the service must be screened and cleared by the appropriate authorities to the grade of clearance in line to classified information, intelligence in the possession of SARS and areas designated as National Key points that it may have. Obtaining a positive recommendation is the responsibility of the contracting firm concerned. If the principal contractor appoints a subcontractor, the same provisions and measures will apply to the subcontractor.

7.19 Governing Law

South African law governs this RFP and the RFP response process. The Bidder agrees to submit to the exclusive jurisdiction of the South African courts in any dispute of any kind that may arise out of or in connection with the subject matter of this RFP, the RFP itself and all processes associated with the RFP.

8 Instructions for submitting a response to this RFP

This paragraph details the instructions to Bidders for preparing a Tender response to RFP 64/2018. These instructions must be followed in detail to ensure that the information contained in the Bidder's Tender is correct, complete and well structured. All Tenders must comply with the requirements and instructions as set out in the RFP. Bidders must ensure that information and documentation supplied can be easily understood and thus, evaluated in a fair and consistent manner.

Should a Tender be received that is not in the correct format, SARS reserves the right to reject the entire Tender or portions of the Tender depending on the extent of the deviation from the format described in this document. Information that has not been requested must not be submitted in the Bidder's Tender.

8.1 Organisation of a Tender response

8.1.1 Irrespective of whether the Bidder is responding to portions of the Tender, or the Tender as a whole, the Bidder will be required to submit the following:

FILE 1	Exhibit 1
	➤ Pre-qualification documents (SBD documents)
	Exhibit 2
	➤ Technical Responses ➤ Supporting documents for technical responses
FILE 2	Exhibit 3
	➤ Supplementary information
	Exhibit 4
	➤ Latest 3 year audited/reviewed financial statements.
	Exhibit 1
	➤ B-BBEE Certificate together with completed SBD 6.1 ➤ Pricing
NB: Please note that the Technical response must be put in one file as per exhibit above and the pricing & B-BBEE must be put in a separate file as indicated above.	