

REQUEST FOR INFORMATION

DESCRIPTION:

HOME LOAN PROVIDERS FOR SARS EMPLOYEES

DATE ISSUED: 28 February 2020

CLOSING DATE: 27 March 2020 at 11H00

TENDER BOX:

GROUND FLOOR, LINTON HOUSE

BROOKLYN BRIDGE

570 FEHRSEN STREET

BROOKLYN

PRETORIA



TABLE OF CONTENTS

1.	INTRODUCTION	3
2.	OVERVIEW OF SARS	3
3.	BACKGROUND	4
4.	PURPOSE OF THIS REQUEST FOR INFORMATION (RFI)	4
5.	LEGISLATIVE METHODOLOGY OF THE RFI	4
6.	BRIEFING SESSION	5
7.	TIMELINE OF THE RFI PROCESS	5
8.	SERVICE PROVIDERS RESPONSES/ RFI SUBMISSIONS	5
9.	INSTRUCTIONS TO SERVICE PROVIDER(S)	6
10.	SPECIAL CONDITIONS OF THIS RFI	7



1. INTRODUCTION

The South African Revenue Service (SARS) is uniquely placed to contribute to government's plan of action to address socio-economic growth and development, poverty alleviation and job creation. Through the vital role of providing the revenue to fund the full spectrum of initiatives, plans, programmes and strategies of national and provincial government departments, SARS plays a crucial enabling role for government delivery.

2. OVERVIEW OF SARS

Our Mandate

In terms of the South African Revenue Service Act, 1997 (Act No. 34 of 1997), SARS is mandated to:

- Collect all revenues due;
- Ensure maximum compliance with tax and customs legislation; and
- Provide a customs service that will maximise revenue collection, protect our borders and facilitate trade.

Our Vision

SARS is an innovative revenue and customs agency that enhances economic growth and social development, and that supports the country's integration into the global economy in a way that benefits all South Africans.

Our Mission

To optimise revenue yield, to facilitate trade and to enlist new tax contributors by promoting awareness of the obligation to comply with tax and customs laws, and to provide a quality, responsive service to the public.

Our Values

- Fairness
- Integrity
- Transparency
- Honesty
- Accountability
- Respect
- Trust

Our Core Outcomes

- Increased Customs Compliance;
- Increased Tax Compliance;
- Increased ease and fairness of doing business with SARS; and
- Increased cost effectiveness, internal efficiency and institutional respectability.

3. BACKGROUND

During the 2019 wage negotiations, Labour Unions tabled a demand for support services for home loan application and related services on a voluntary participation basis to SARS employees. The SARS Procurement is in the process of gathering information from home loan providers that can offer SARS employees preferential rates and 100% bond, hence the RFI.

4. PURPOSE OF THIS REQUEST FOR INFORMATION (RFI)

The purpose of this Request for Information (RFI) is to solicit information from home loan providers that can offer SARS employees preferential rates and 100% bond.

This RFI may result in a two-stage process:

- The first stage shall entail the issuing of a Request for Information (RFI) to solicit information.
- The second stage shall entail issuing of a Request For Proposal (RFP) with detailed technical specifications through an open tender process.

This RFI does not constitute an offer to do business with SARS, but merely serves a request for information.

5. LEGISLATIVE METHODOLOGY OF THE RFI

5.1. PROCUREMENT LEGISLATION

SARS has a detailed evaluation methodology premised on Treasury Regulation 16A3 promulgated under Section 76 of the Public Finance Management Act, 1999 (Act No. 1 of 1999), the Preferential Procurement Policy Framework Act, 2000 (Act No. 5 of 2000): Procurement Policy Regulations, 2017 and the Broad-Based Black Economic Empowerment Act, 2003 (Act No. 53 of 2003) as amended.

5.2. TECHNICAL LEGISLATIONS AND/OR STANDARDS

The Service Provider(s) should be cognisant of all relevant legislation and/or standards applicable to the provision of the services.

6. BRIEFING SESSION

There will be no briefing session for this RFI, All queries can be sent to SARS' nominated official in writing, Mr Andre Taljaard (Procurement Tender Office) via email at tenderoffice@sars.gov.za and cc rfi-professionalservices@sars.gov.za.

7. TIMELINE OF THE RFI PROCESS

The project timeframes of this RFI are set out below:

Table 1

Activity	Date Due
Advertisement of RFI in the Government Tender Bulletin	28 February 2020
Advertisement of RFI in the eTender website	28 February 2020
Distribution of RFI documents on SARS website	02 March 2020
Questions relating to the RFI from Service Provider(s)	02 March - 12 March 2020
RFI Closing Date	27 March 2020 at 11H00
Invitation for a presentation as and when required	April 2020

All times and dates in this RFI are South African Standard Time. Any time or date in this RFI is subject to change at SARS' sole discretion. The establishment of a time or date in this RFI does not create an obligation on the part of SARS to take any action, or create any right in any way for any Service Provider to demand that any action be taken on the date established. The Service Providers accepts that, if SARS extends the deadline (the closing date) for RFI submissions for any reason, the requirements of this RFI otherwise apply equally to the extended deadline.

8. SERVICE PROVIDERS RESPONSES/ RFI SUBMISSIONS

Service Providers are required to submit their response to the information in this section.

Service Providers are hereby advised that SARS is not committed to take any course of action as a result of its



issuance of this RFI and/or its receipt of submissions in response to it.

12.1 PRODUCT AND SERVICES

Provide the following:

- What products and services for home loans and related services does your company offer?
- What is your companies national footprint?
- What are the terms and conditions for product and services of home loan applications?
- What are the minimum requirements of home loan applications for SARS employees? And what are the exclusions?
- What are the terms and conditions for preferred interest rate?
- What are the terms and conditions for a 100% bond?
- What are the terms and conditions for a 110% bond?
- Does the Service Provider render the services as a Mortgage Originator or other alternative services? If other, please state.
- What are the advantages and disadvantages for SARS to consider the services of Mortgage Originator or other alternative services for preferred employees.

8.2 SUPPORT SERVICES

Provide the following:

- Contact details of the key contact person / Accounts Manager and support staff.
- Support structure for potential clients/employees who require home loans and other related services.
- Support structure for potential clients/employees who require home loans and other related services
- Client relationship management and support structures to employees/clients who have taken home loans and other related services with your company.

8.3 VALUE ADDED SERVICES

The Service Provider must list value added services of preferred employees on home loans and other related services.

9. INSTRUCTIONS TO SERVICE PROVIDER(S)

- RFI submission must be properly packaged and deposited in the tender box on or before the closing date and time at the SARS Tender Office situated at:
Linton House - Ground Floor

Brooklyn Bridge
570 Fehrsen Street
Brooklyn
Pretoria

- RFI documents may also be posted to the Tender Office - SARS Procurement Department, Linton House, Brooklyn Bridge, 570 Fehrsen Street, Brooklyn, Pretoria, 0181.
- The Service Provider(s) are required to submit one (1) file and one (1) USB with the content of the file by the closing date and time.
- Each file and USB must be marked correctly for ease of reference during the evaluation process.

Table 2

FILE (REQUEST FOR INFORMATION)
<ul style="list-style-type: none">• Exhibit 1 – Product and services• Exhibit 2 – Support Services• Exhibit 3 – Value Added Services

10. SPECIAL CONDITIONS OF THIS RFI

10.1 Preparation Costs

The Service Provider will bear all its costs in preparing, submitting and presenting any response to this RFI and all other costs incurred by it throughout the RFI process. Furthermore, no statement in this RFI 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 Service Provider in the preparation of their response to this RFI.

10.2 Limitation of Liability

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

10.3 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 RFI or a Service Provider's response will be disclosed by any Service Provider or other person not officially involved with SARS' examination and evaluation of a RFI.



10.4 No binding Agreement

It must be clearly understood that no business will be awarded to any vendor out of this request for Proposal. South African Revenue Services (SARS) further reserves the right to contact individual Service Providers to obtain further information should this be deemed necessary.

10.5 Disclaimers

Respondents are hereby advised that SARS is not committed to any course of action as a result of its issuance of this RFI and/or its receipt of submissions in response to it. In particular, please note that SARS reserves the right and at its sole and full discretion to:

- 10.5.1 Utilise any information provided to it in response to this RFI to draft the scope of requirements for inclusion in a subsequent RFP;
- 10.5.2 Take no further action whatsoever, if it so decides;
- 10.5.3 Withdraw from this process and the provisions of this project at any time;
- 10.5.4 Select the RFI and RFI participants based on SARS criteria;
- 10.5.5 Not invite RFP respondents for further participation in the RFI process; and
- 10.5.6 Not bind itself to accept any or all of the RFIs.